Nationwide Virtual Site Inspection
User Guide
for
Field Inspector

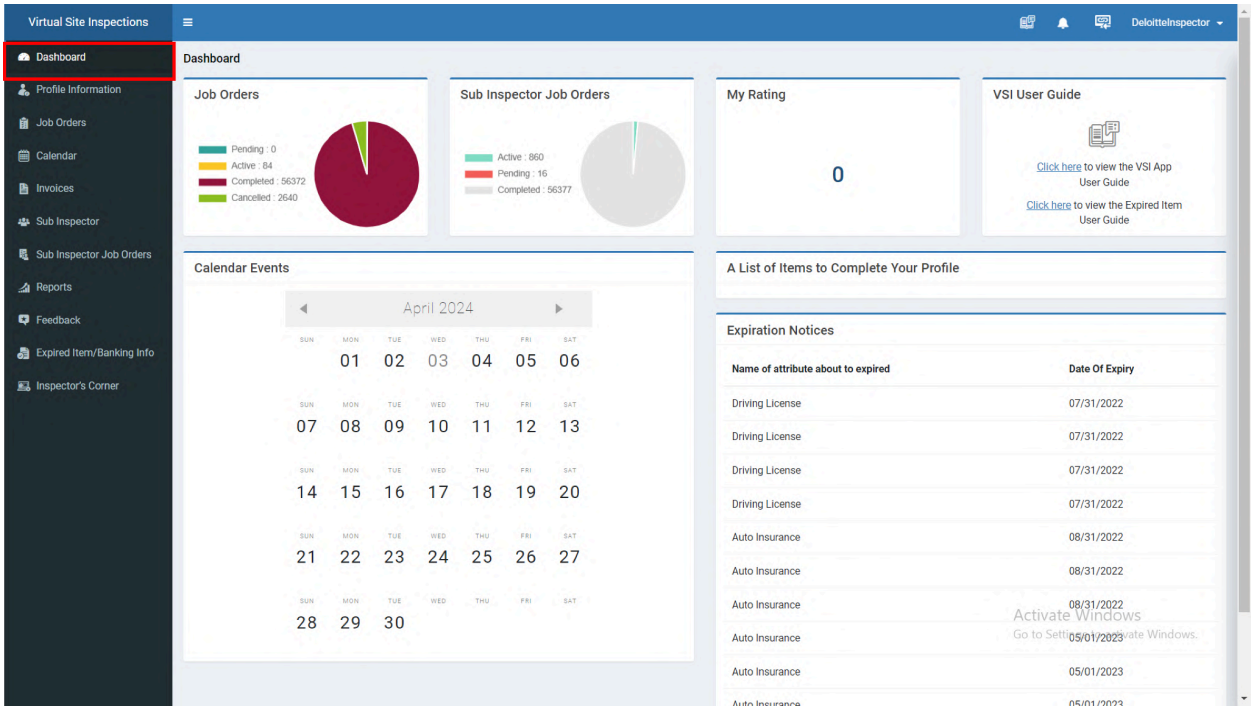
Introduction

This feature includes the following functionalities:

- Dashboard
- Profile
- Job Order
- Calendar
- Invoices
- Sub Inspector
- Sub Inspector Job Orders
- Reports
- Feedback
- Expired Items/Banking Info
- Inspector Corner
- Header options (log out,notification,user guide,profile completed alert)

Dashboard

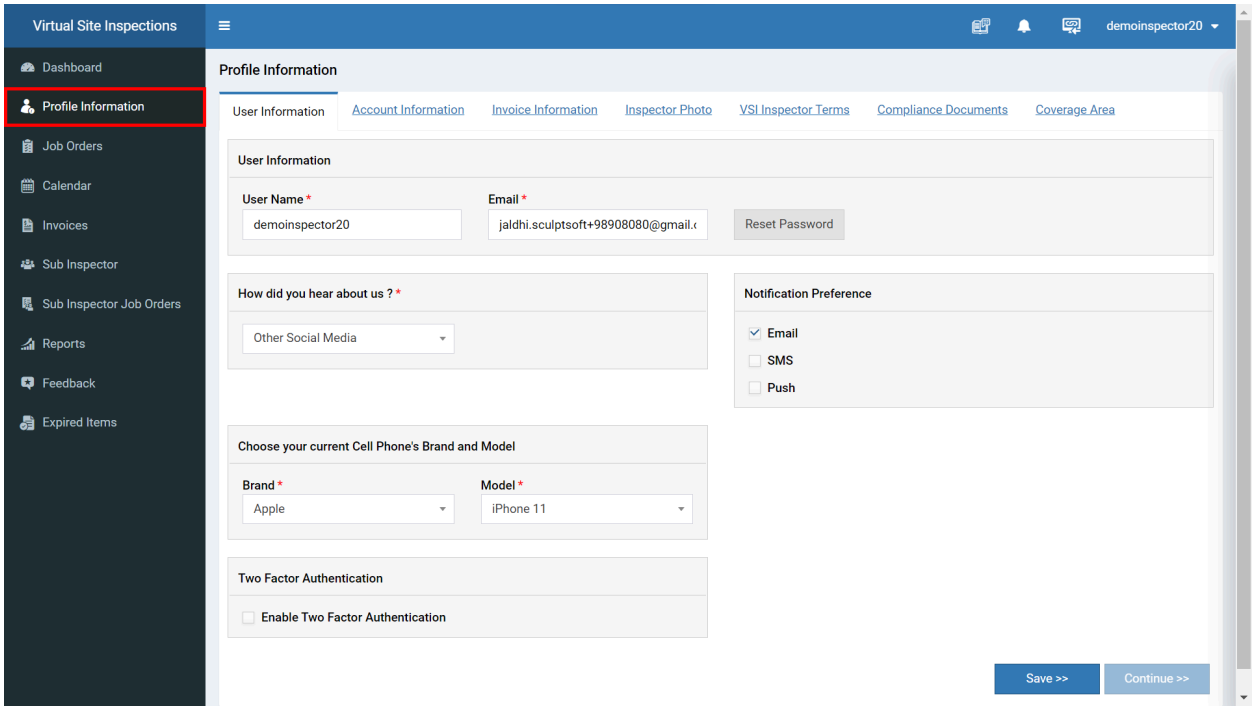
The inspector's portal dashboard shows a quick picture of important things like Job Orders, Sub-Inspector Job Orders, and how users are rated when they're logged in. It also gives easy access to the VSI App user guide. To help with planning and keeping track of tasks, there's a calendar. You also get a checklist to finish your user profile, and it shows you when important things are about to expire. The screenshot below gives a good look at all the useful features on the dashboard.



Profile Information

To view and update your user profile, simply click on the 'Profile Information' tab located on the left side of the screen. This action will redirect you to a new page, where you can make any necessary changes to your profile.

To easily find your information, the portal has different tabs like "User Information", "Account Information", "Invoice Information", "Inspector Photo", "VSI Inspector Terms", "Compliance Document" and "Coverage Area". Just click on the tab you need, and it will take you to that part where you can manage those specific details.

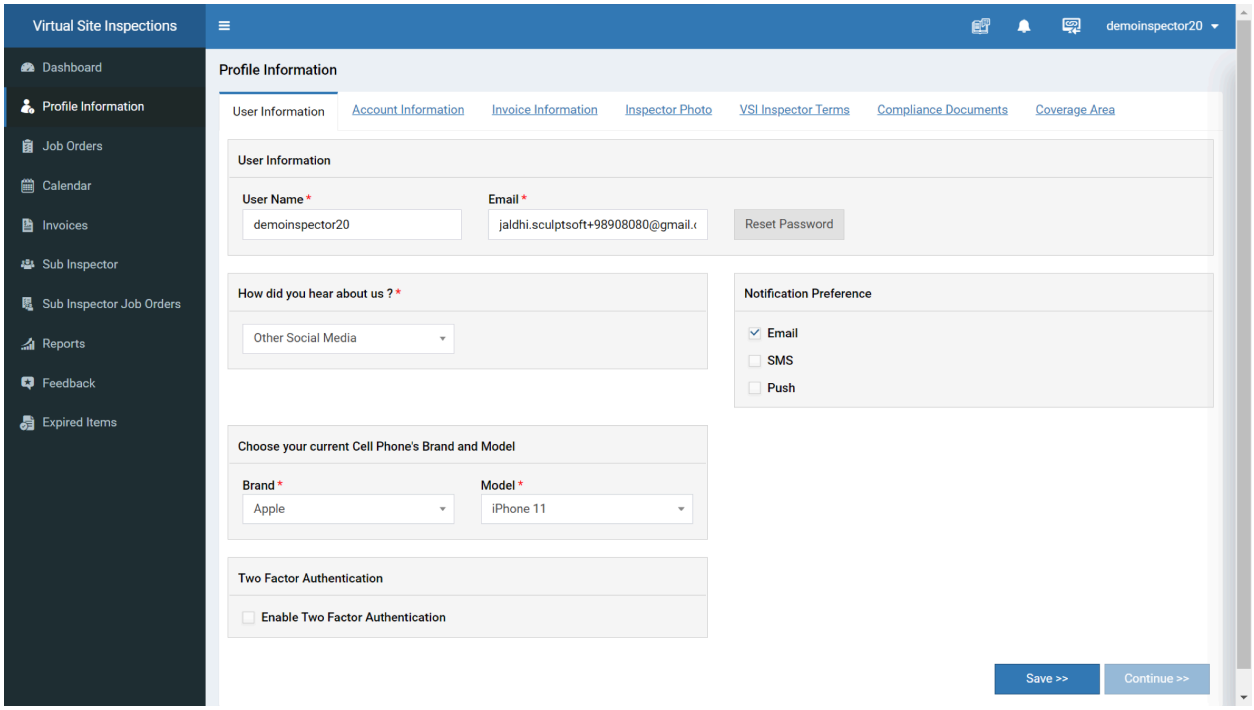


a) User Information Tab

In the 'User Information' section, you can check the details like your User Name, Password, and how you heard about us. There are different options for that, like Facebook, LinkedIn, other social media, referral, search engine, and email marketing, and you can choose one of them.

You also get to choose how you want to get notifications: by email, SMS, or push. The kind of notifications you get will depend on what you pick. Additionally , you can find details about the brand and model of your cell phone right below.

Choose your current cell phone's brand and model in that section. It displays two dropdowns for brand and model selection.



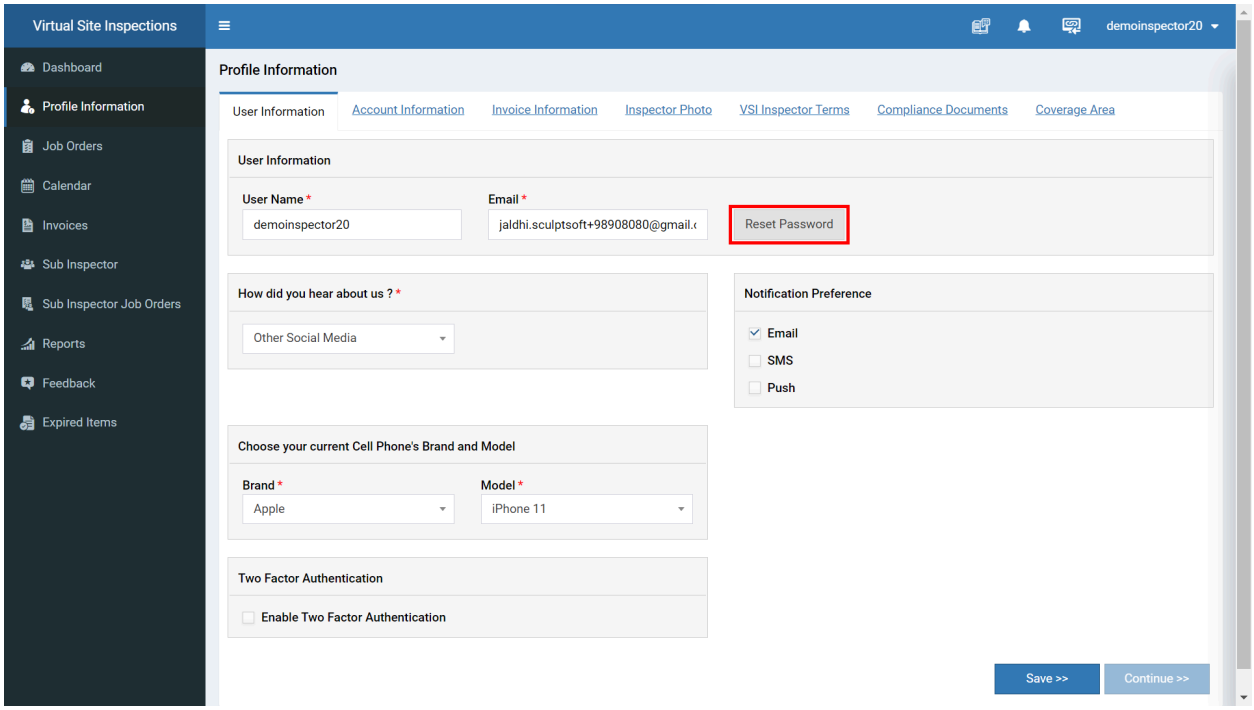
To enhance security, there is a two-factor authentication section where you can establish your password using OTP (One-Time Password).

Password: The initial factor is the conventional password you have set for your account. Mobile OTP: The second factor involves a time-sensitive, unique code sent to your mobile device. After entering your password, you will receive a one-time code on your mobile through SMS.

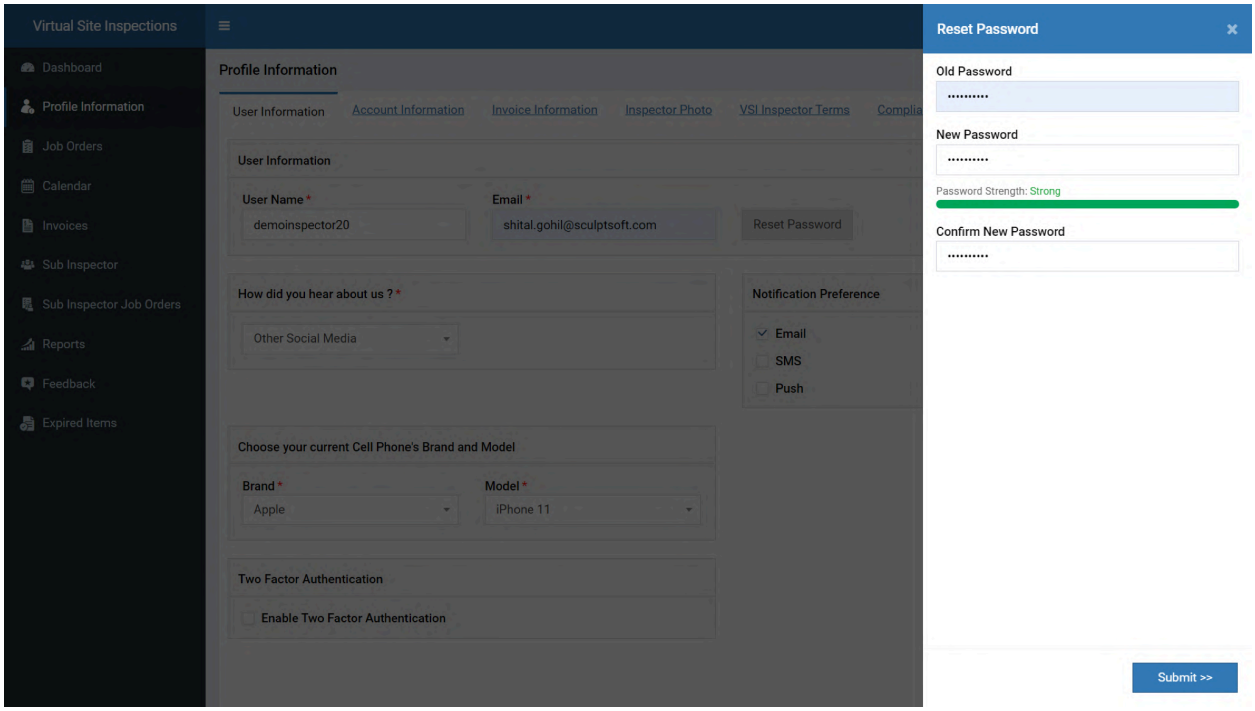
To activate or deactivate two-factor authentication, simply mark or unmark the 'Enable Two-Factor Authentication' checkbox.

If two-factor authentication is enabled, after clicking 'login' and entering your current password during the initial login, you will be automatically redirected to the OTP (One-Time Password) screen. This screen serves as a verification step, prompting you to enter the OTP sent to your registered cellphone number in your profile.

To reset your password, click on the 'Reset Password' button.



After clicking, a sidebar will open. In this sidebar, enter your current password and the new password you want to set. Below the new password, you'll see an indication of your password strength.

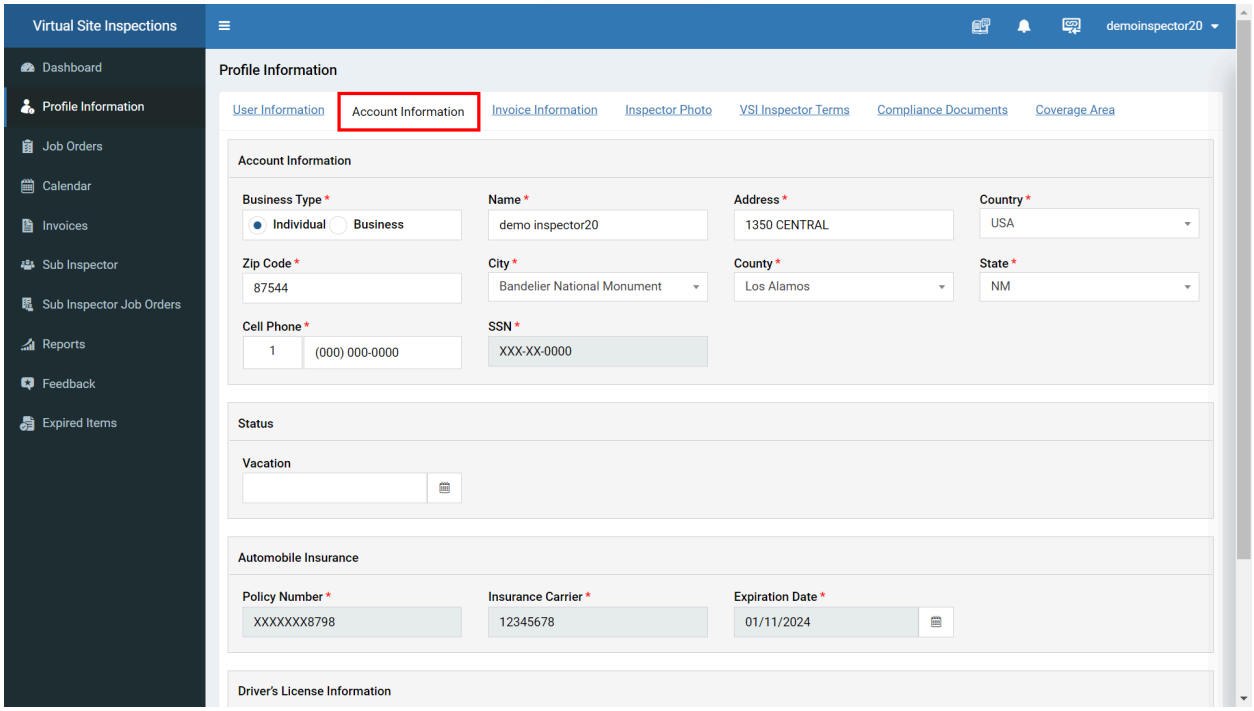


To save the changes made in the User Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

b) Account Information Tab

Clicking the 'Account Information' tab opens a new section that contains four different sub-sections: Account Information, Status, Automobile Insurance, and Driver License Information. This section provides an overview of your account details, current status, information related to automobile insurance, and details about your driver's license.

The Account Information section is where you will find your personal details, including your name, address, cell phone number, and Social Security Number (SSN). Depending on whether you select 'Individual' or 'Business' as your business type, the corresponding fields will be displayed. If you choose 'Individual' you will see the SSN field, but if you select 'Business' you will see the new field Company Name and Tax ID fields instead of the SSN.

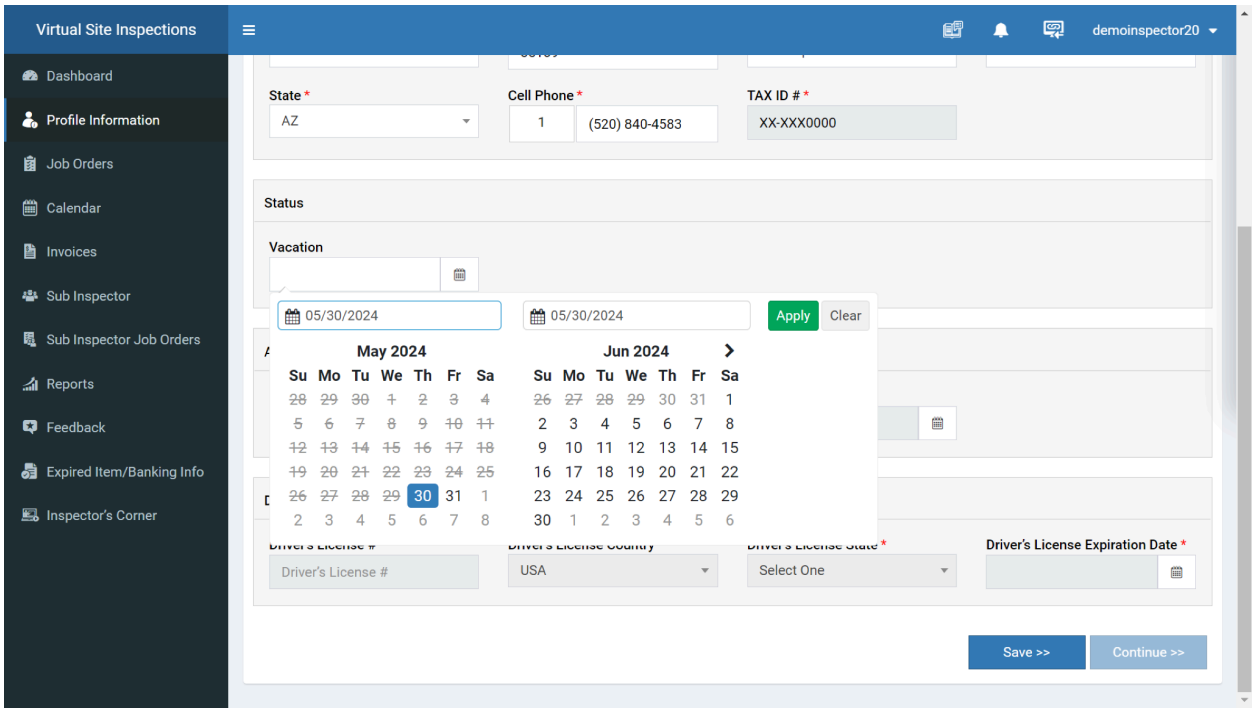


How to Place Yourself on Vacation

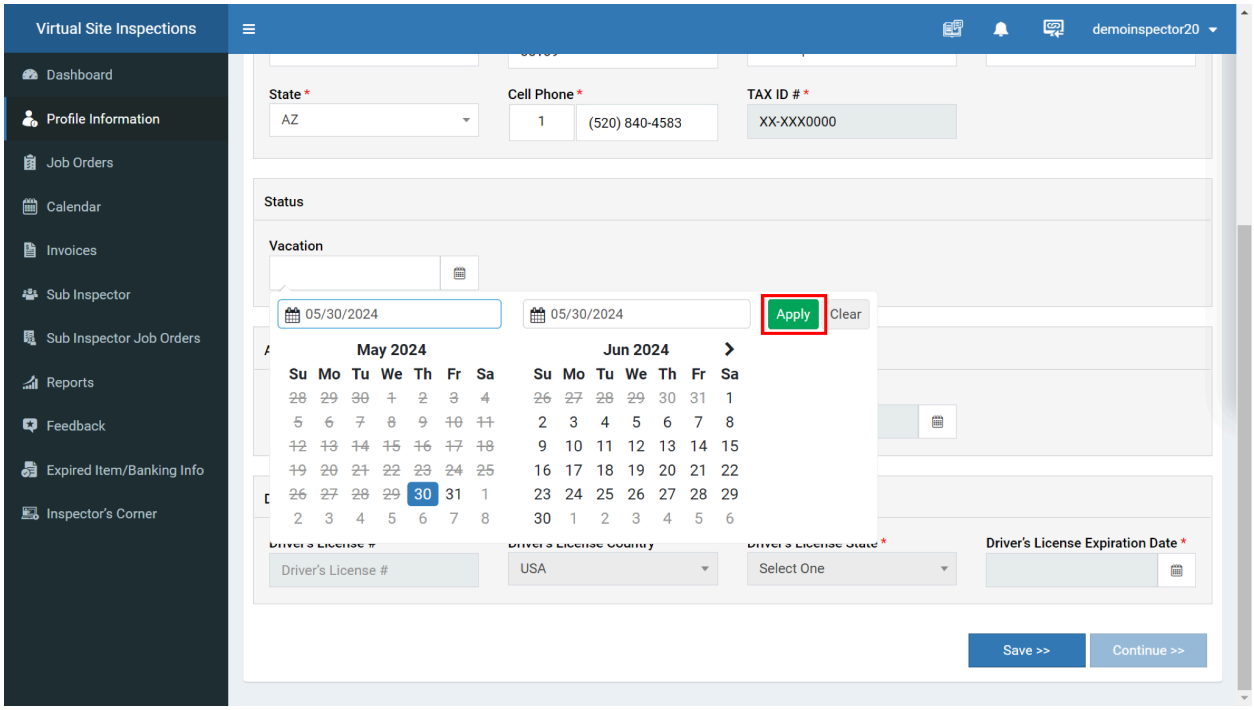
In the status section, there's a specific field labeled "Vacation Date" where inspectors can indicate their vacation plans by entering the start and end dates of their time off. Once these dates are set, the system automatically moves that the inspector is on vacation status.

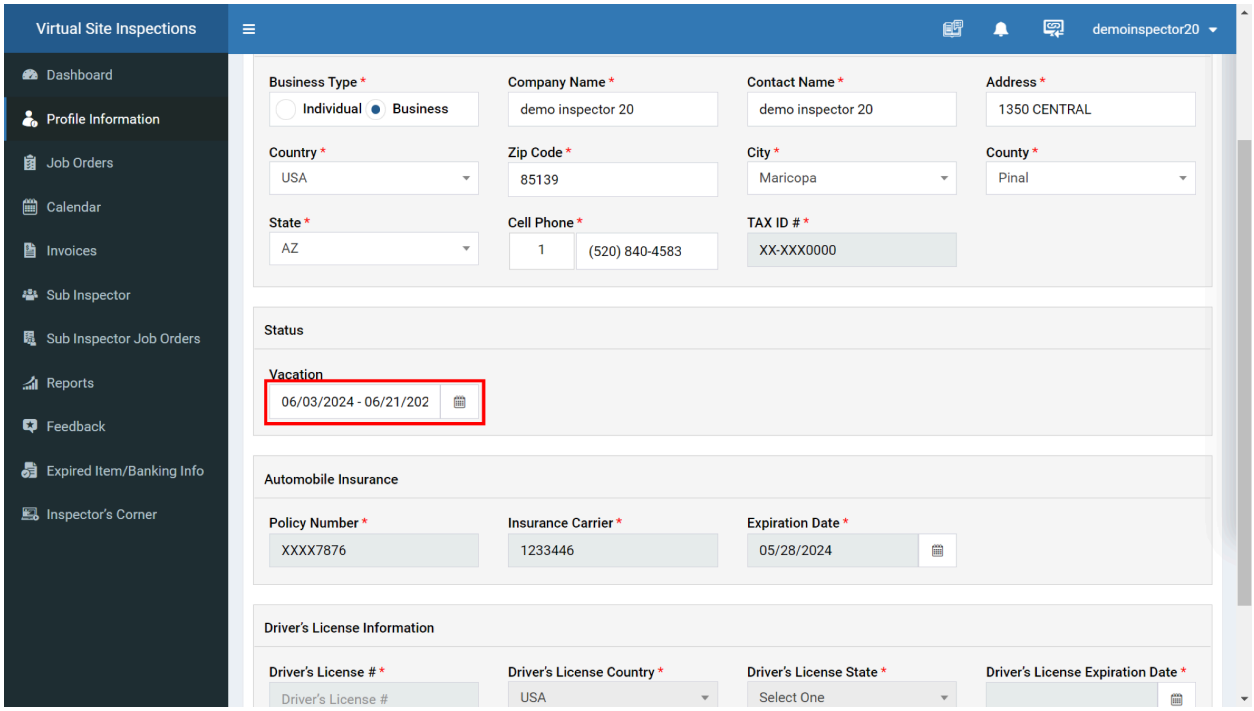
When the vacation period ends, the system automatically moves the inspector's status back to "Active" status.

Upon clicking on the "Vacation Date" field, a calendar date picker will open, so the inspector can select the vacation period (Vacation Start and Vacation End) dates.



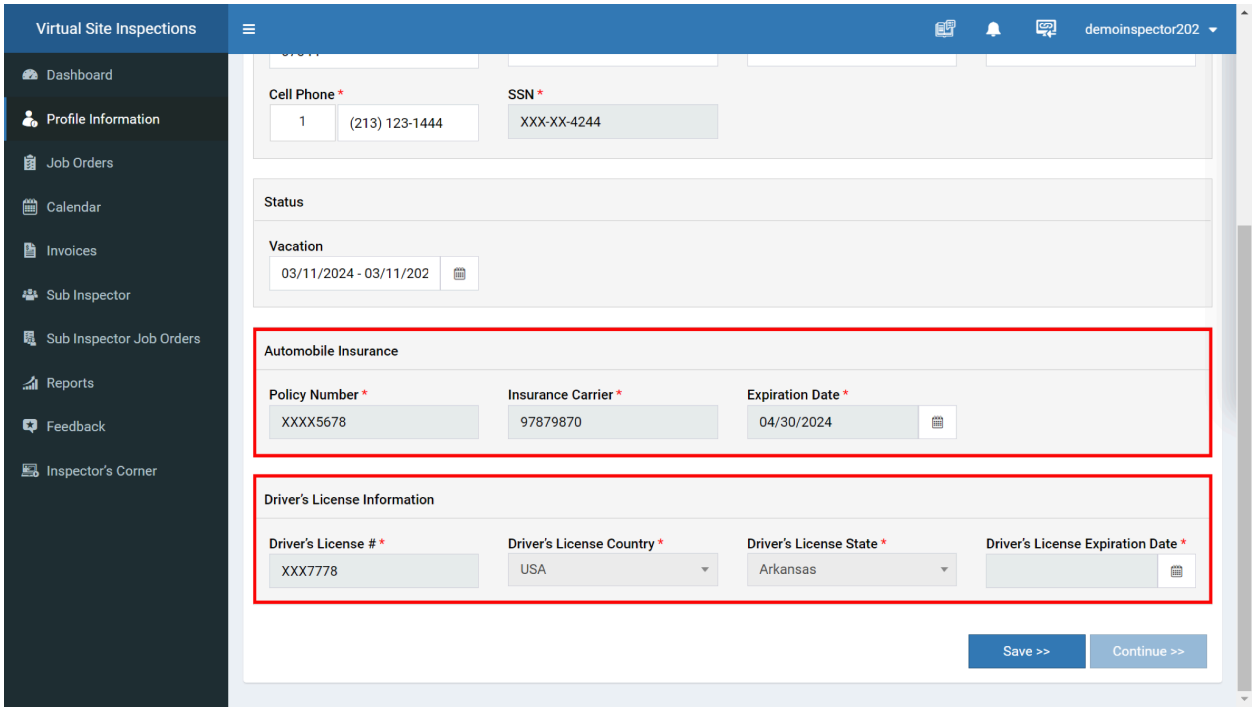
After selecting the Vacation Start and Vacation End dates, click on the "Apply" button on the calendar, and the selected dates will be set in the Vacation Field. Please tap on the ‘Save >>’ button to apply the vacation related changes.





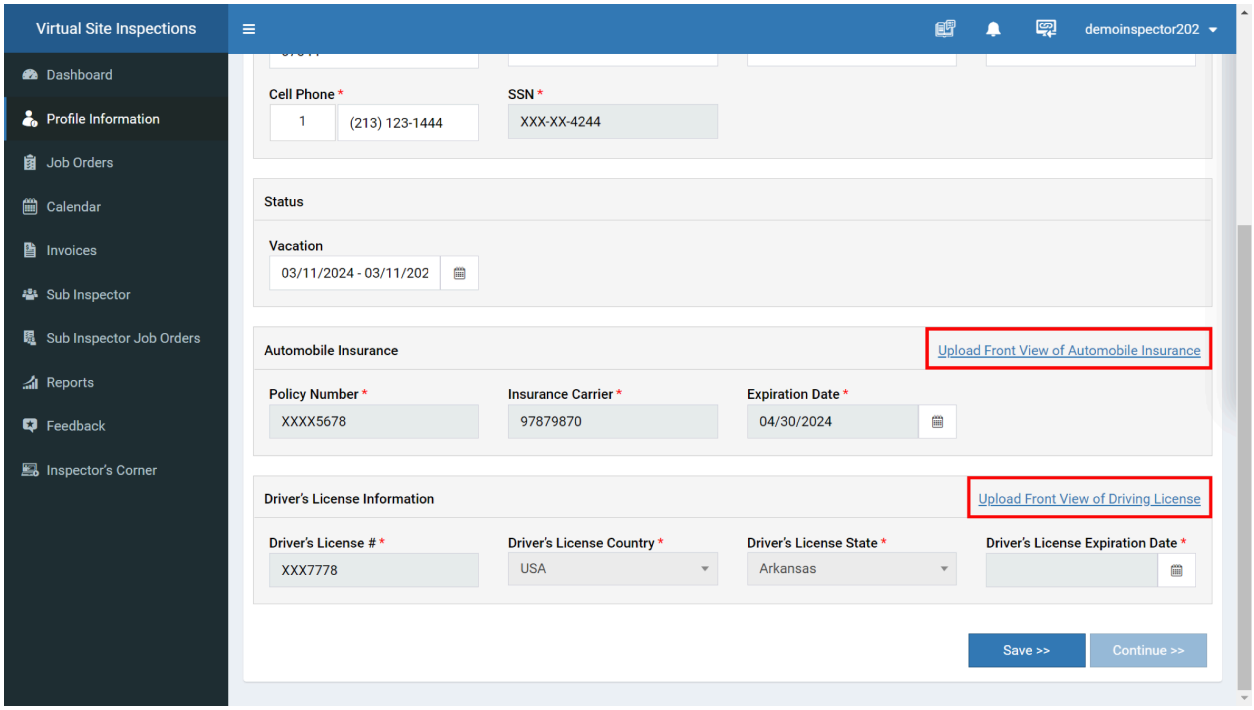
Note: If an inspector is on vacation status, the vacation date field will be disabled.

The Automobile Insurance and Driving License Information Section is disabled in the inspector's profile. Therefore, the inspector won't be able to add or update any information in that section.

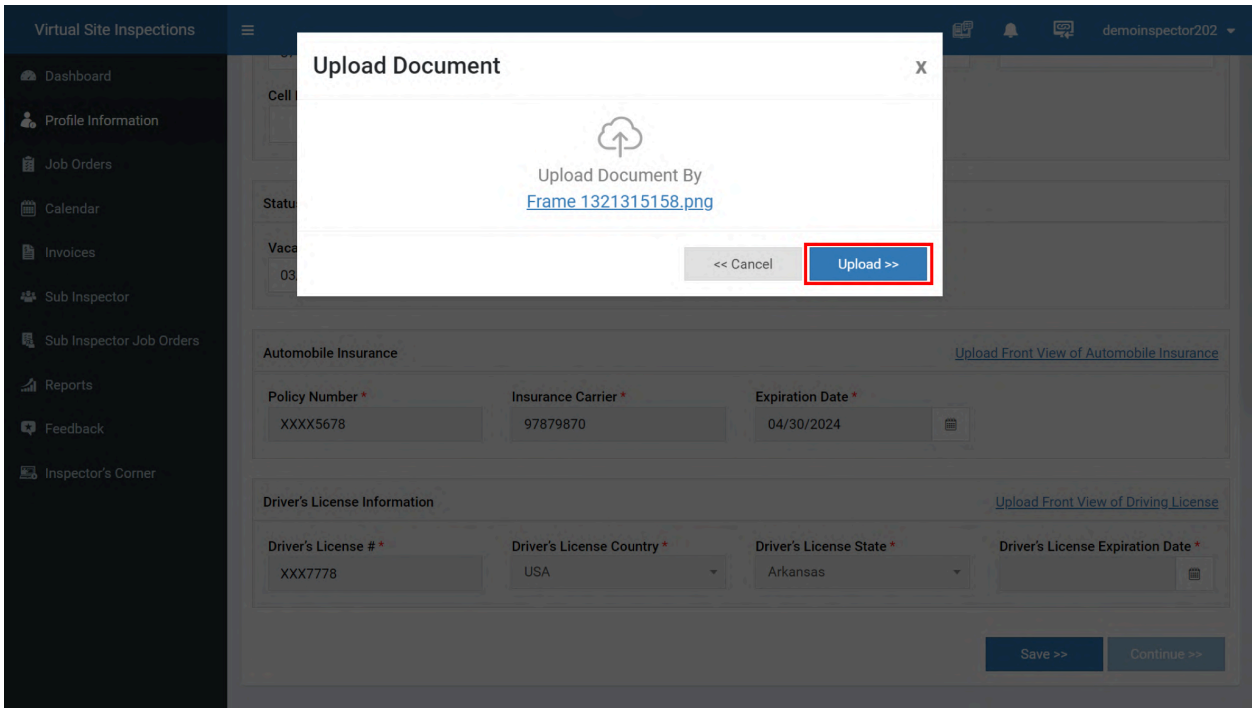


The 'Upload Front View of Automobile Insurance' and 'Upload Front View of Driving License' links will be visible when the status is Inactive(default status is inactive). For other statuses the links will not be visible.

In case, you do not see the link to upload the documents, you can upload from the side panel “Expired Item/Banking Info” section.



To upload the Auto Insurance/Driving Licence Insurance document, click on the link 'Upload Front View of Automobile Insurance'. A browser pop-up will open, allowing the user to select the file. After selecting the file, click on the 'upload' button within the pop-up. Only files in doc, docx, pdf, jpg, png, and jpeg formats should be allowed.



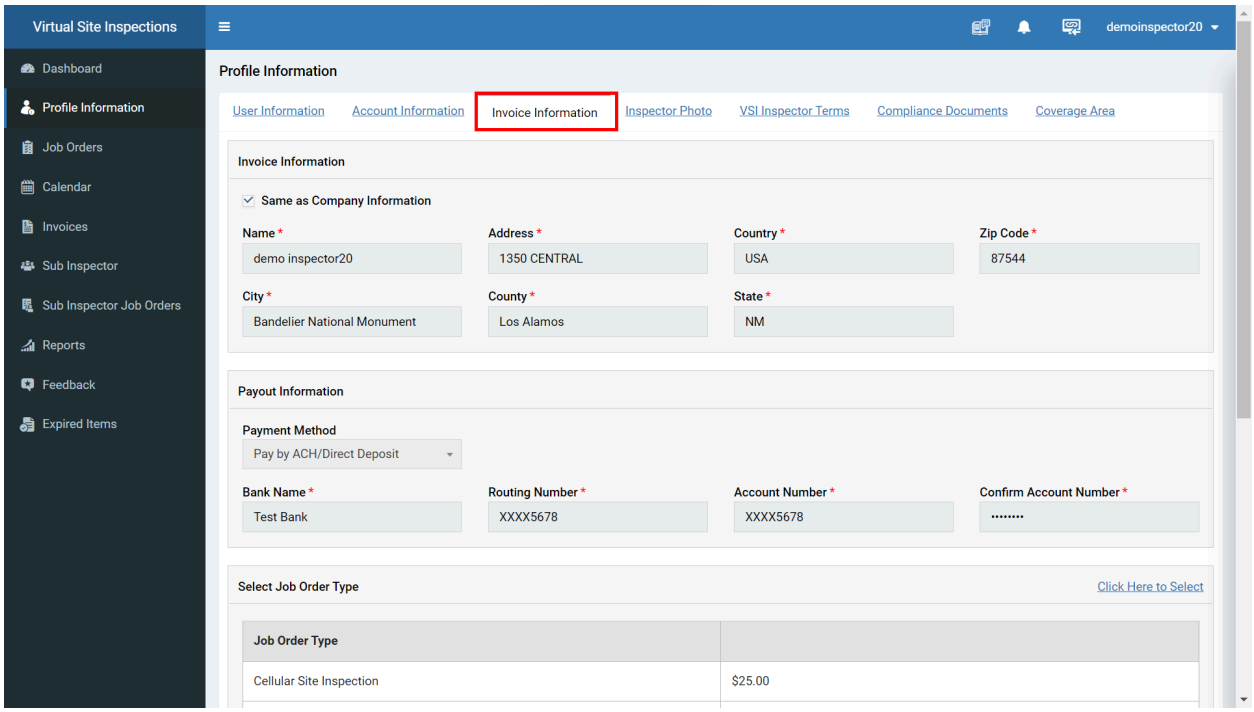
When an inspector uploads an auto insurance or driving license document, it will be sent for approval. Once approved, insurance and driving license information will be updated by the Admin into the profile.

To save the changes made in the Account Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

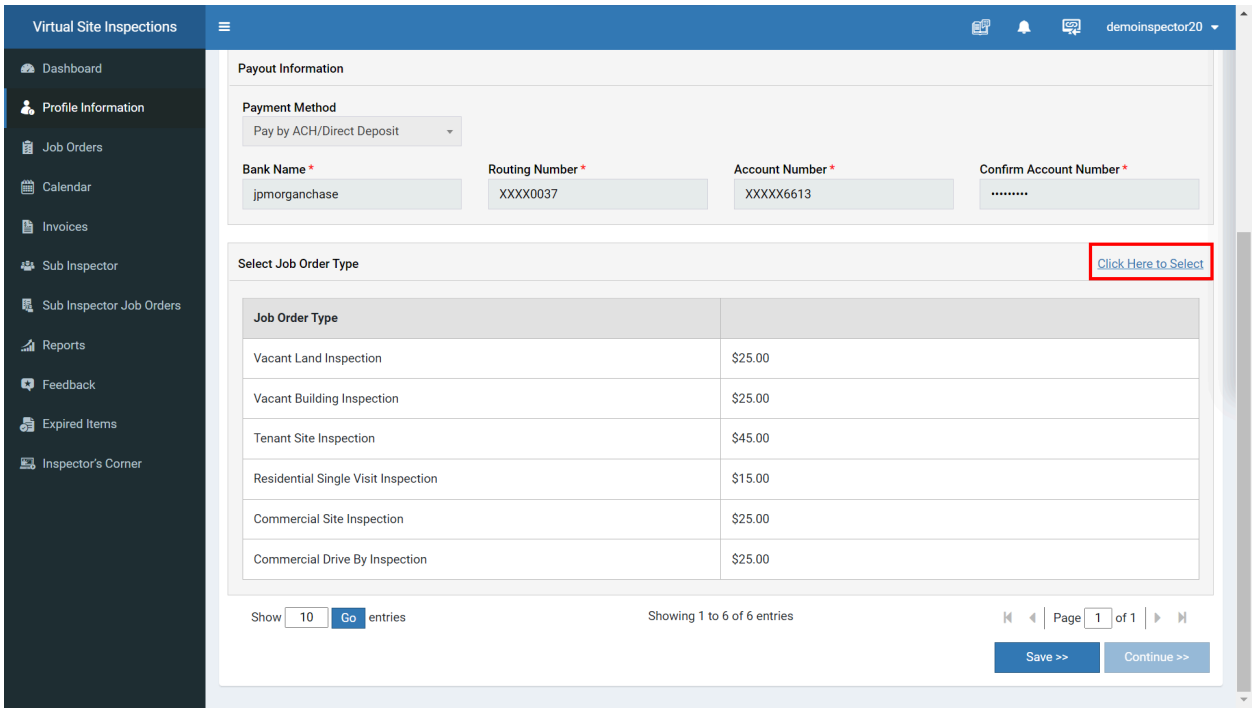
Note: TAX/SSN ID, Automobile Insurance Details and Driver's License Information will be disabled once details are filled and save the details.

c) Invoice Information Tab

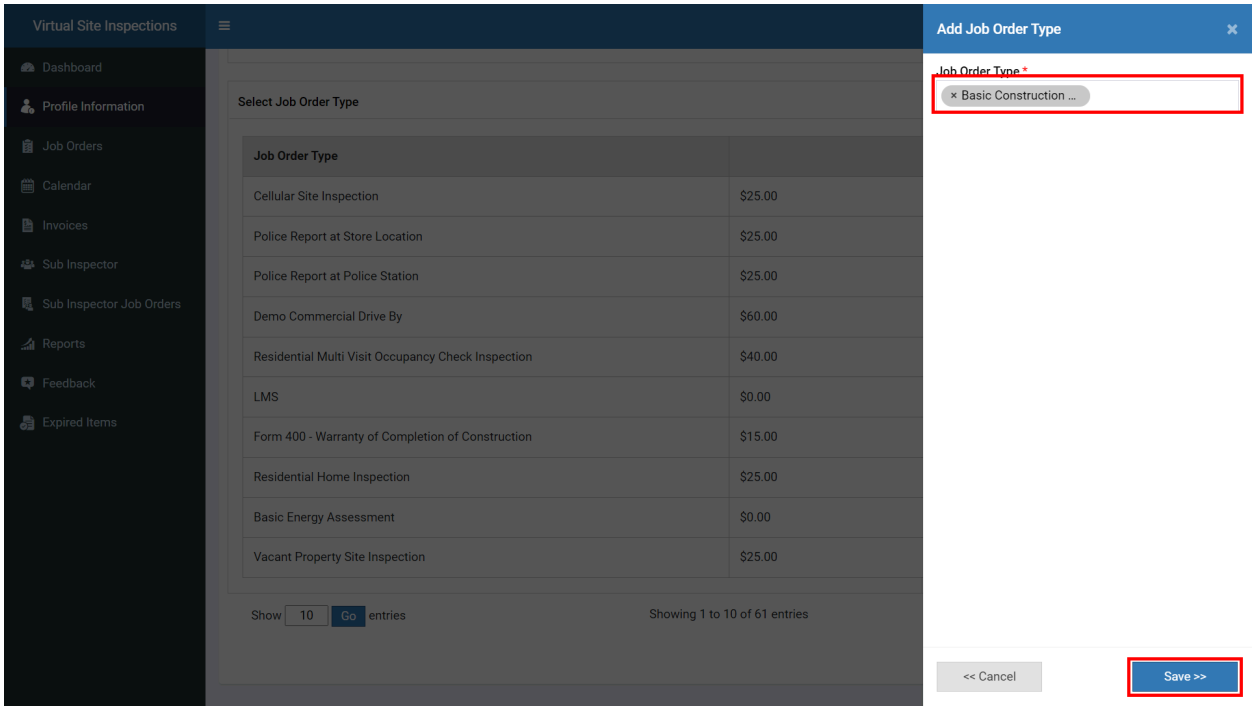
When you click on the 'Invoice Information' tab, a new section will open with three distinct subsections: Invoice Information, Payment Information, and Select Job Order Type. The Invoice Information section focuses on invoicing details like company name and address. The Payment Information section includes details about payment methods and banking information, such as the bank name, routing number, and account number. Additionally, in the 'Select Job Order Type' section, you'll find information about the type of job and its associated pricing.



Upon clicking on "Click Here to Select" a sidebar will open.



In the provided functionality, users can select from various job order types listed in a dropdown menu. Once a specific job order type is chosen, clicking the 'Save' button adds it to the list along with an associated price. Each job order type may have a different price, representing the amount that can be earned upon the successful completion of that particular job order. This feature allows for easy selection and pricing of job orders based on their types.

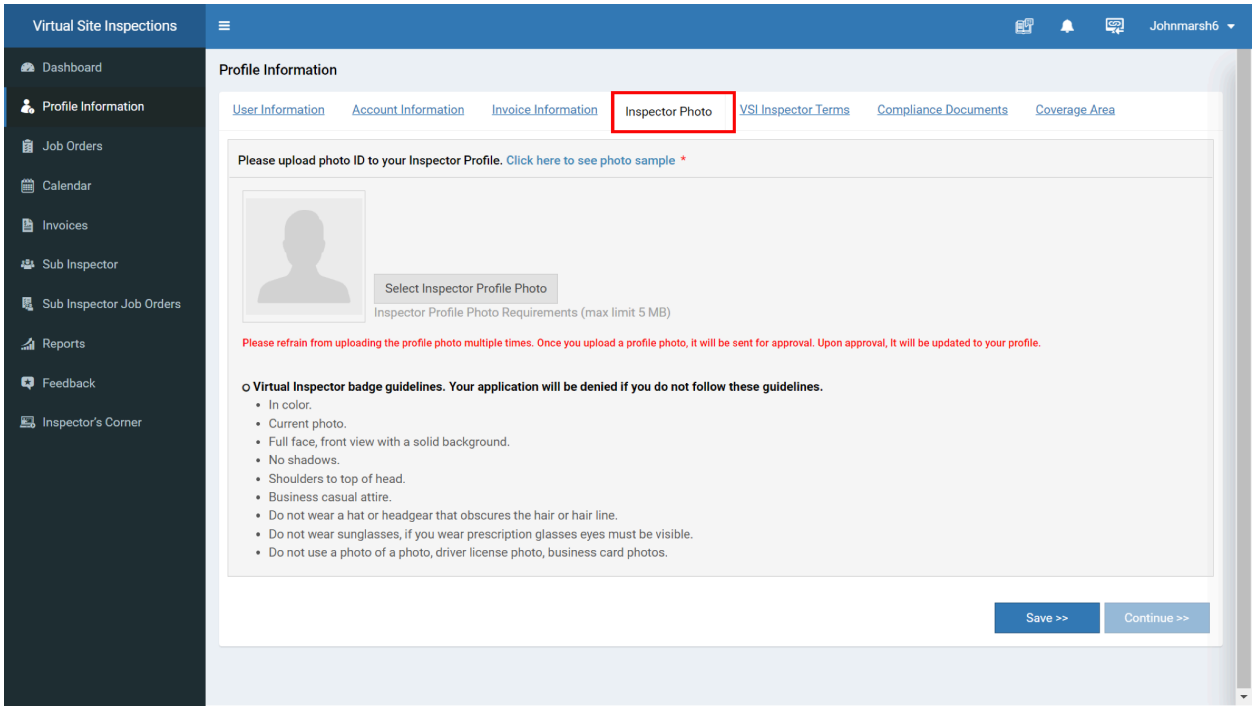


To save the changes made in the Invoice Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

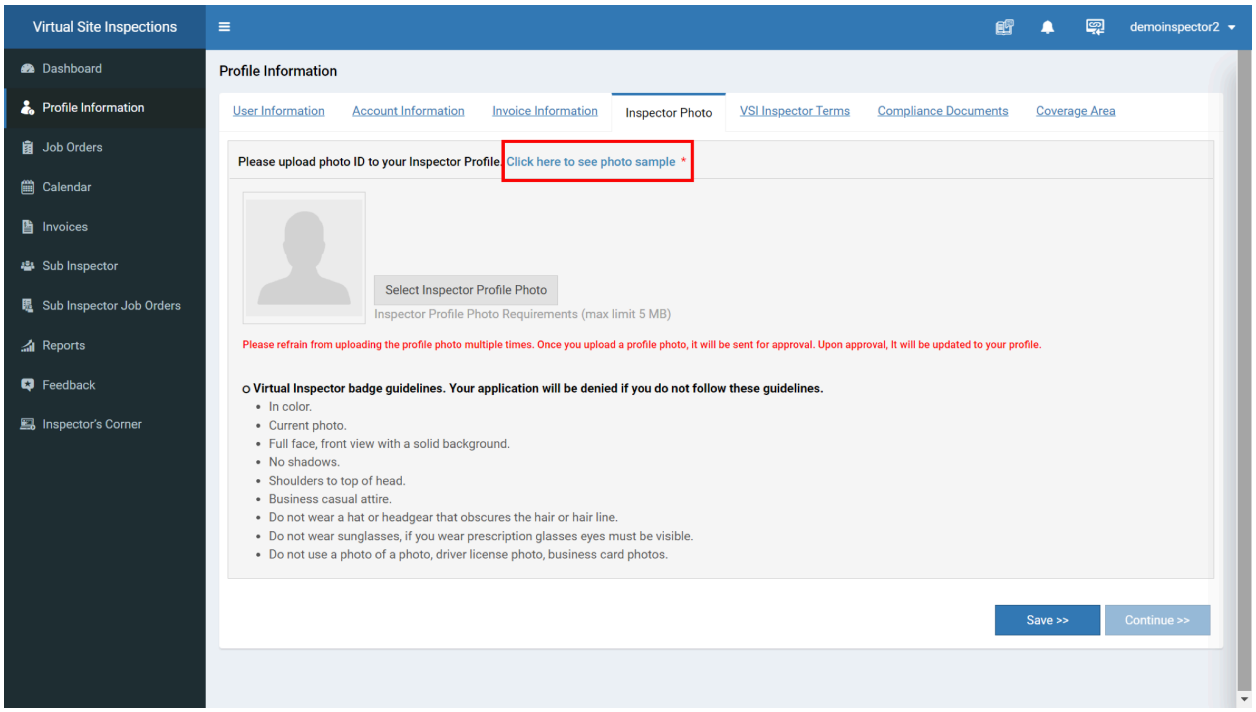
Note: Banking Information such as Bank Name, Routing Number, Account Number and Confirmation Account Number field will be disabled after successfully saving those details.

d) Inspector Photo Tab

When you click on the 'Inspector Photo' tab, a new section will open allowing you to set your photo. Below that, you'll find the photo guidelines section.

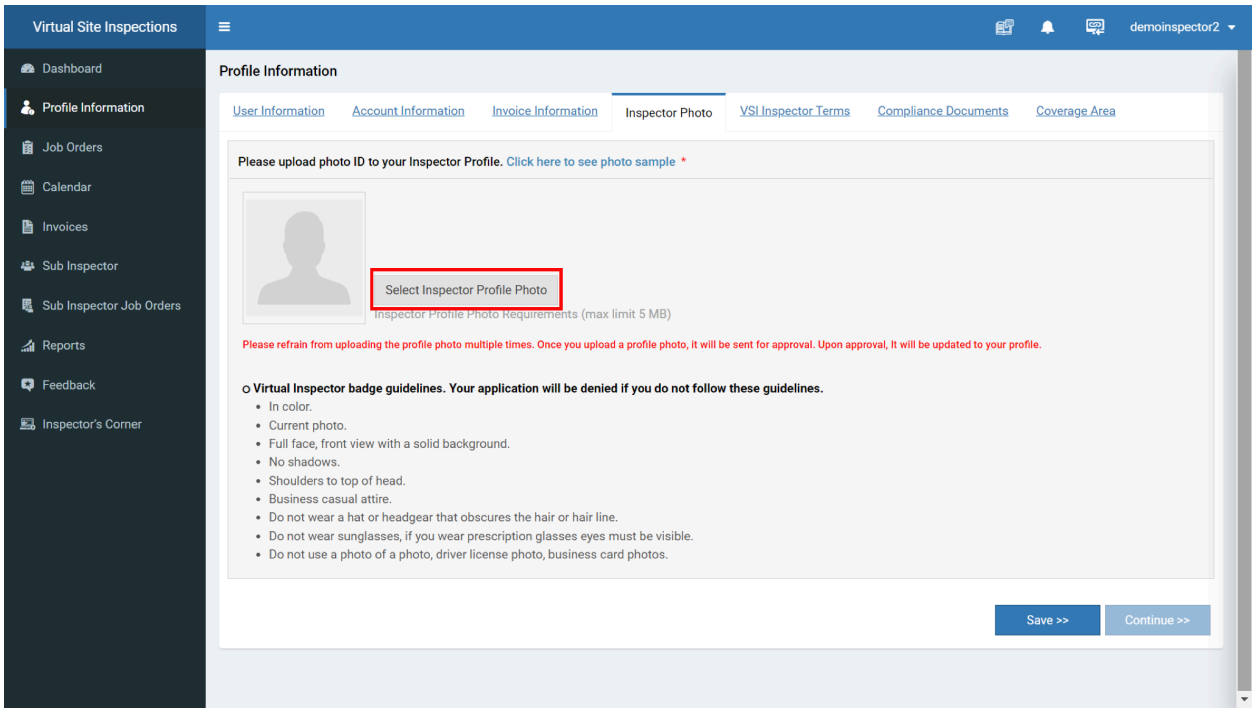


To view the sample photo, click on 'Click here to see photo sample', and a sample inspector profile photo will be displayed. Please Make sure you follow the virtual inspector badge guide line for your profile photo.



To upload a profile photo, click on the "Select Inspector Profile Photo" button. Upon clicking, a browser pop-up will open, allowing the inspector to choose the desired photo.

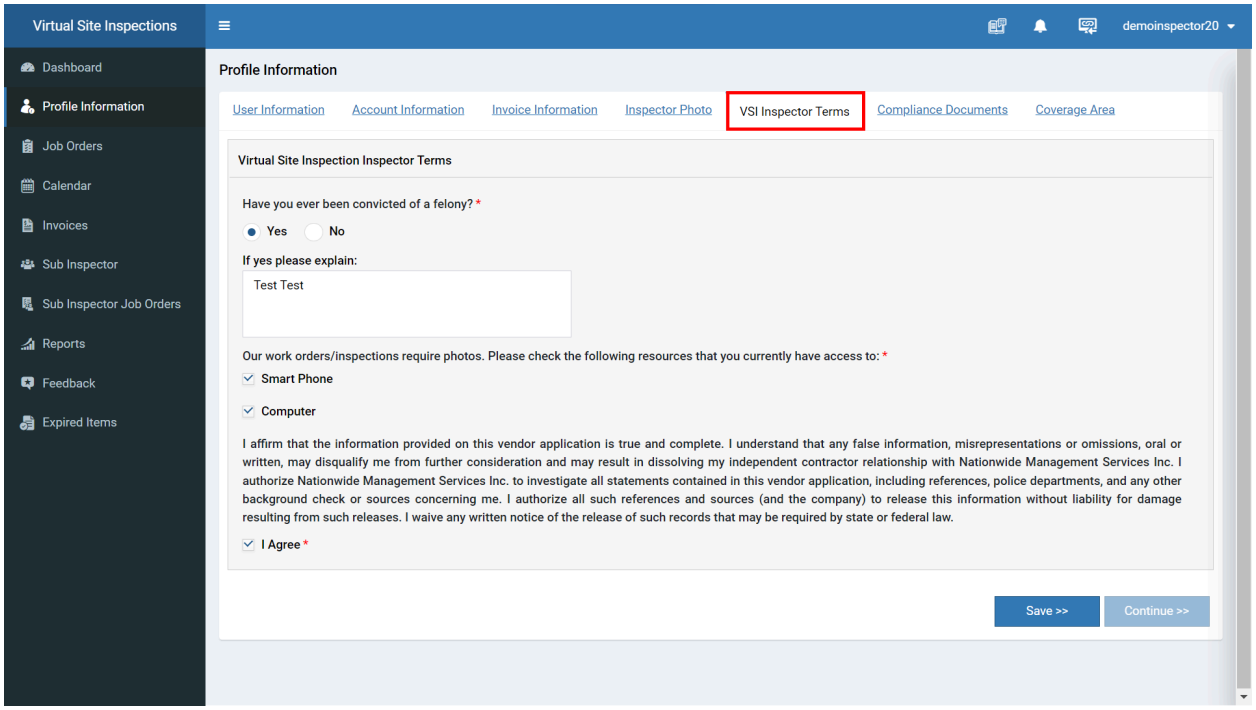
When the inspector uploads a profile photo, it will be sent for approval. Once approved, the profile photo will be automatically set in the profile photo.



To save the changes made in the Inspector Photo tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

e) VSI Inspector Terms Tab

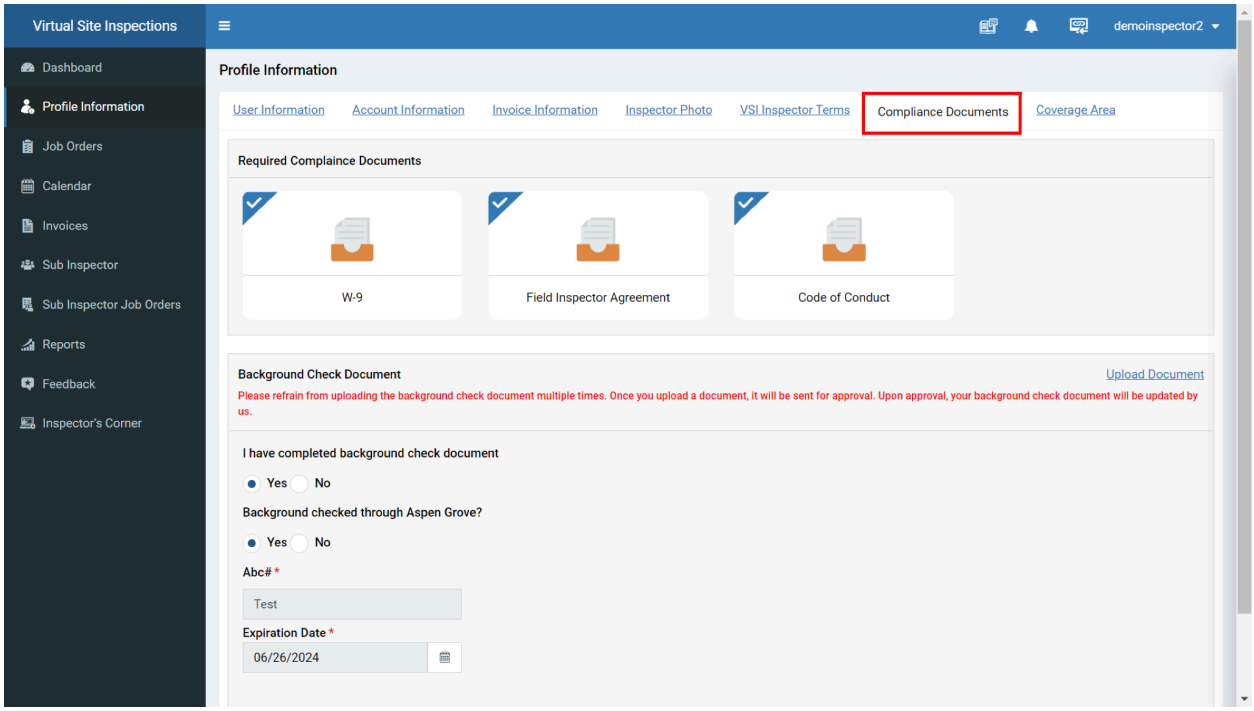
When you click on the 'VSI Inspector Terms' tab, a new section will open where you can review and fill out the required fields for the Virtual Site Inspection Inspector Terms."



To save the changes made in the VSI Inspector Terms tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

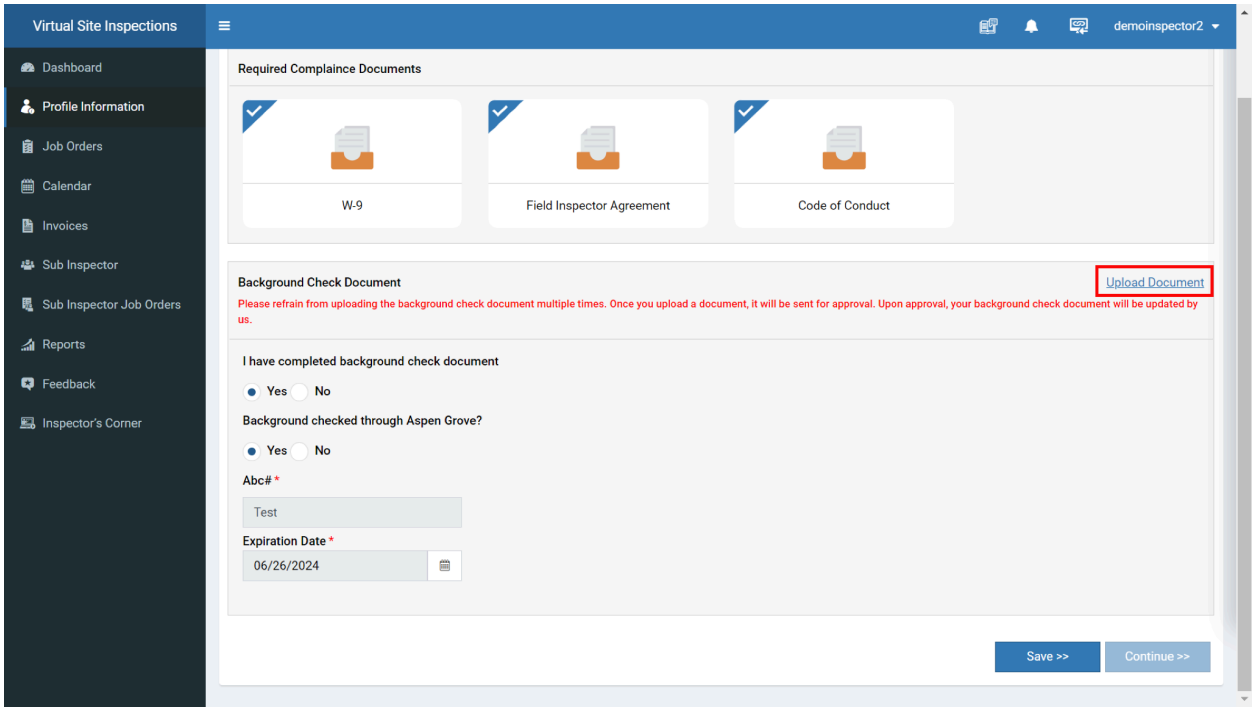
f) Compliance Document

When you click on the 'Compliance Document' tab, a new section will open. Inside this tab, you will find three documents: 'W-9', 'Field Inspector Agreement', and 'Code of Conduct'. From there, you will need to fill in all the required details for each document. Additionally, there is a background check document section.



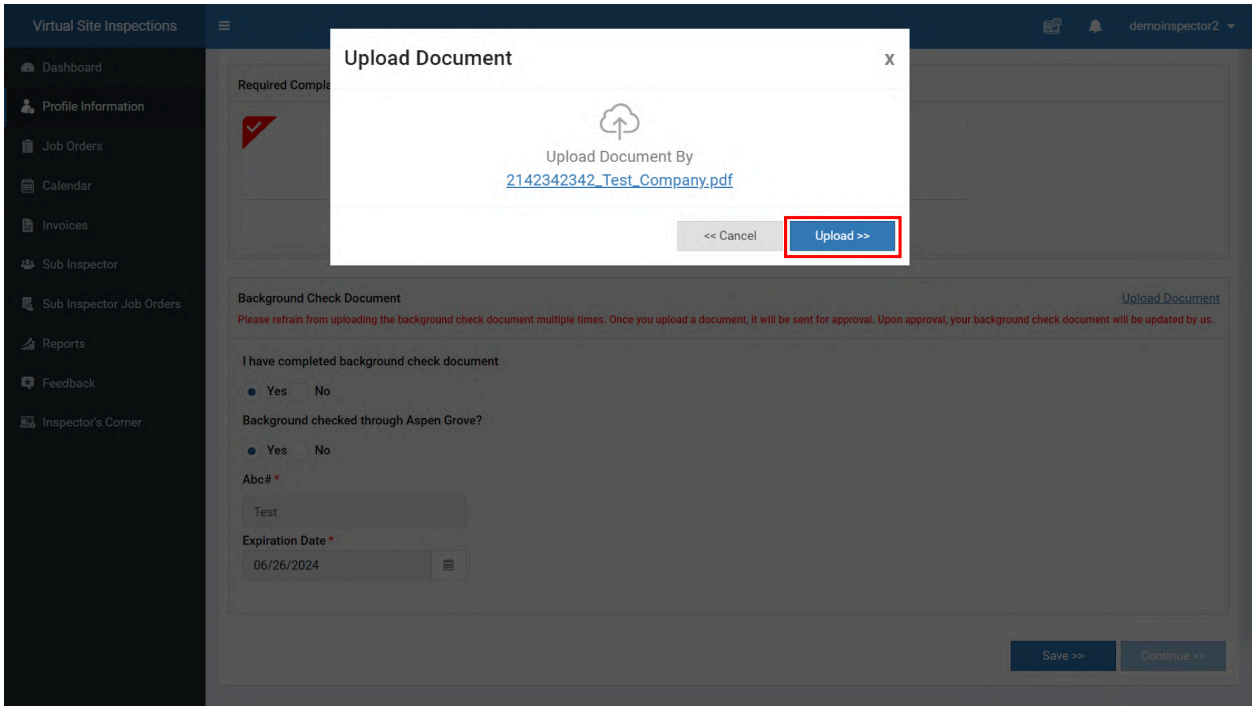
Only inactive inspectors can modify their answers to questions “I have completed background check document” and “Background checked through Aspen Grove”. ABC# and Expiration Date fields are disabled for modification for all inspectors.

The "Upload Document" link will only be visible for inactive inspectors. To upload the background check document, click on the "Upload Document" link.



After clicking on the 'Upload Document' link, a browser pop-up will open. From there, you can select the file and click on the 'Upload' button.

Once Inspector uploads a background check document, it will be sent for approval. Once approved, the background check document information will be updated by the admin.

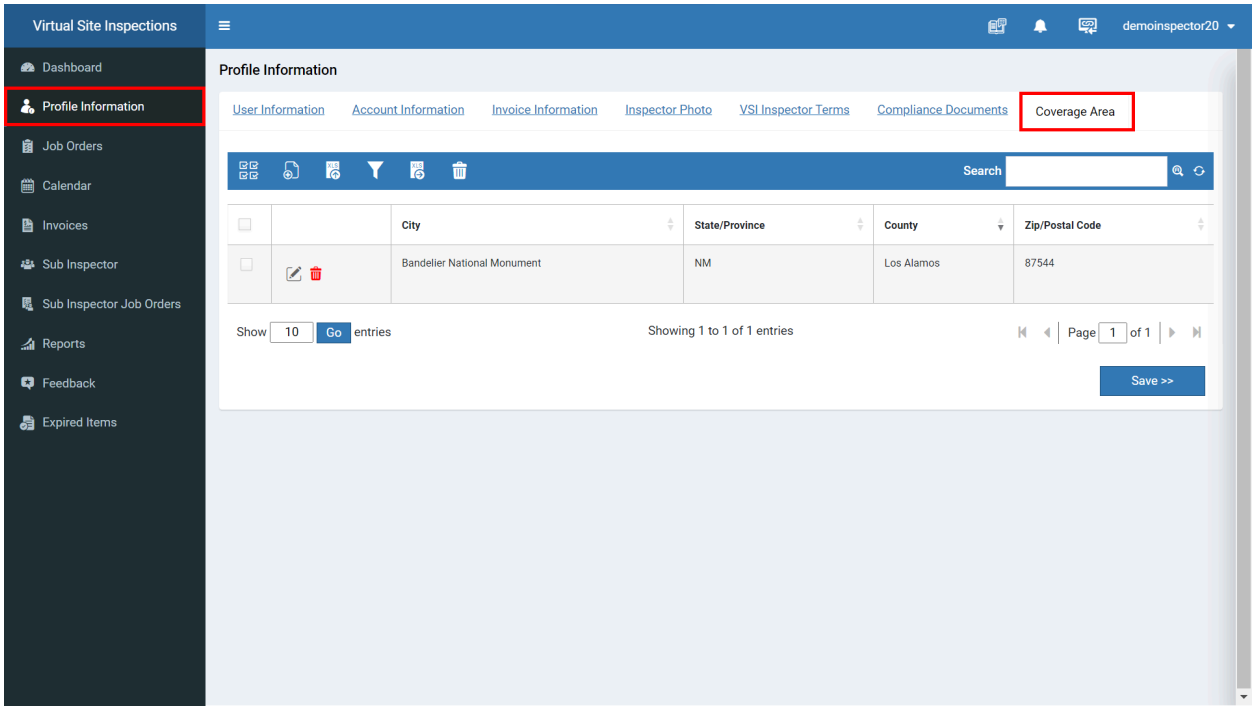


To save the changes made in the Compliance Documents tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

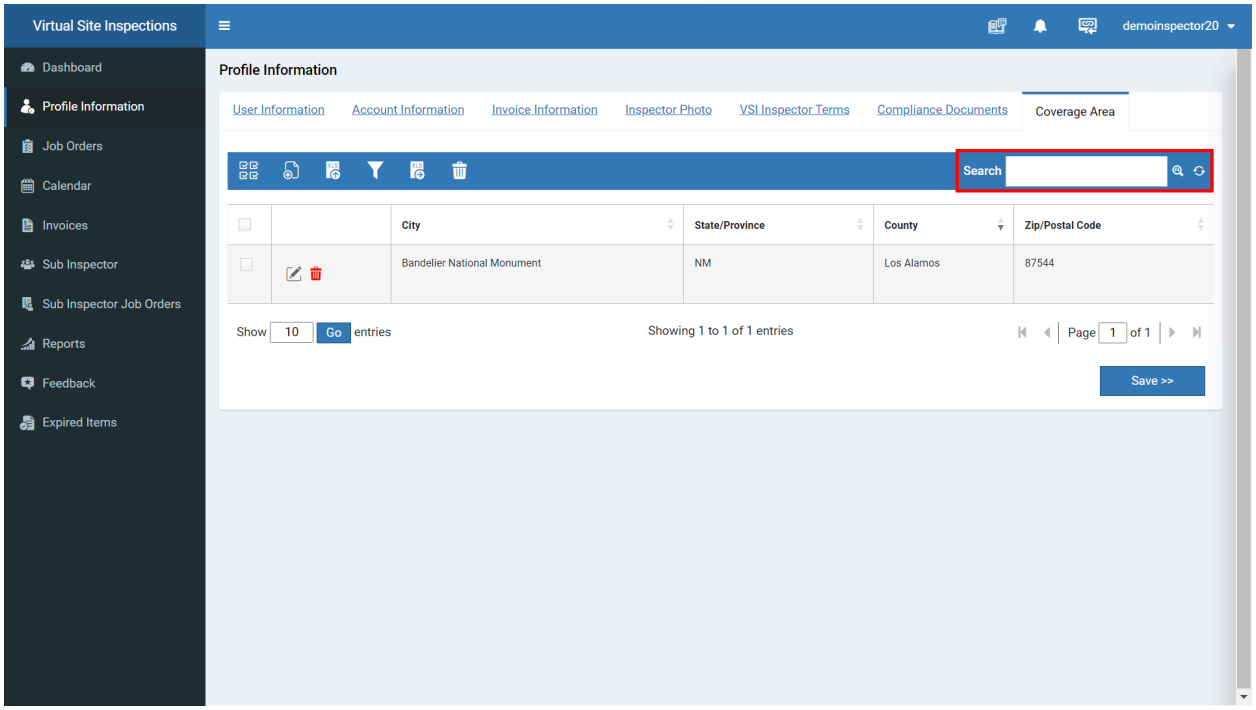
g) Coverage Area

Within the "Coverage Area" section, you'll find six major options in the blue header bar: 'Select All', 'Add New', 'Click here to upload multiple zip codes', 'Filter', ‘XLS Export' and 'Delete'.

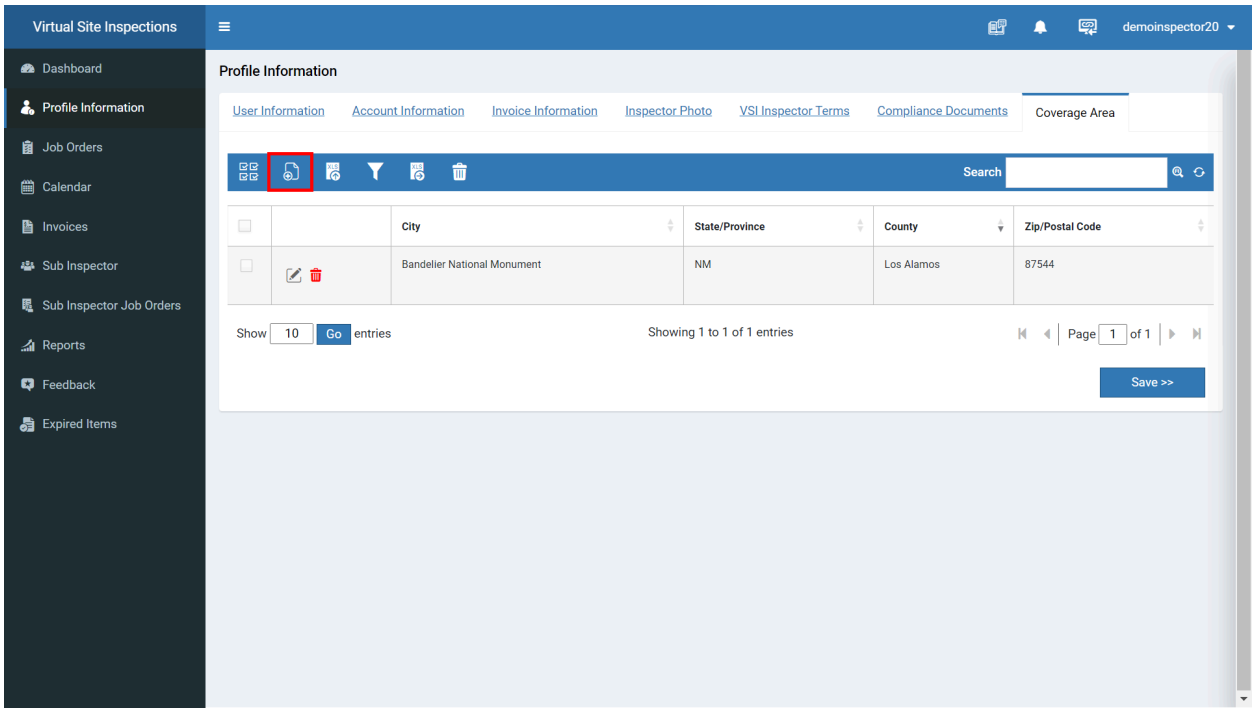
To access the Coverage Area section, the Inspector can click on the "Profile Information" menu located in the left-side panel.This action will redirect them to the Profile Information page. On this page, clicking on the "Coverage Area" tab will open the Coverage Area List page, where all created Coverage Area are displayed.



To search for a Coverage Area using a keyword, the system conducts the search in the Name field. Enter your search term in the highlighted search field, as shown in the provided screenshots, and press enter or click on the finder icon next to the text field. The system will then search for matching words in the City, State/Province, County, Zip/Postal code, and display the relevant Coverage Area records.



To add a new Coverage Area, click on the 'Add New' icon, as highlighted in the provided screenshot.This action will commence the process of adding a coverage area in the inspector profile.

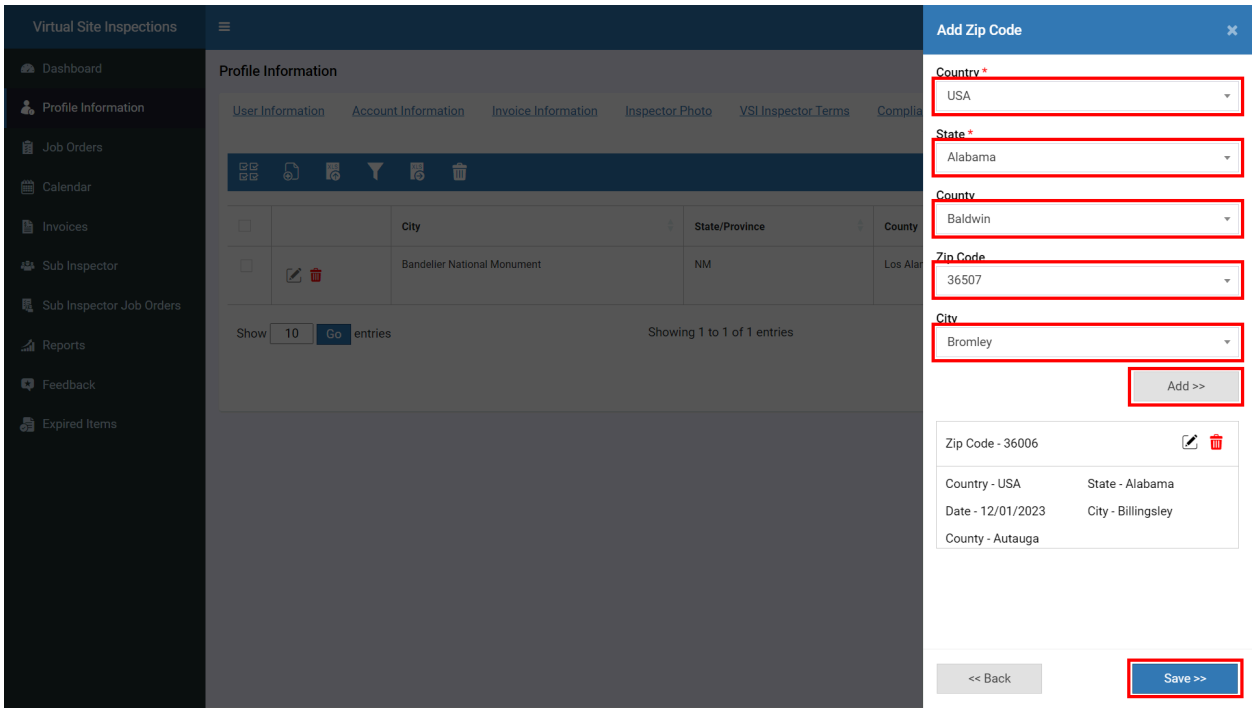


When you click on 'Add Coverage Area', the sidebar will open a side modal. Select the country,

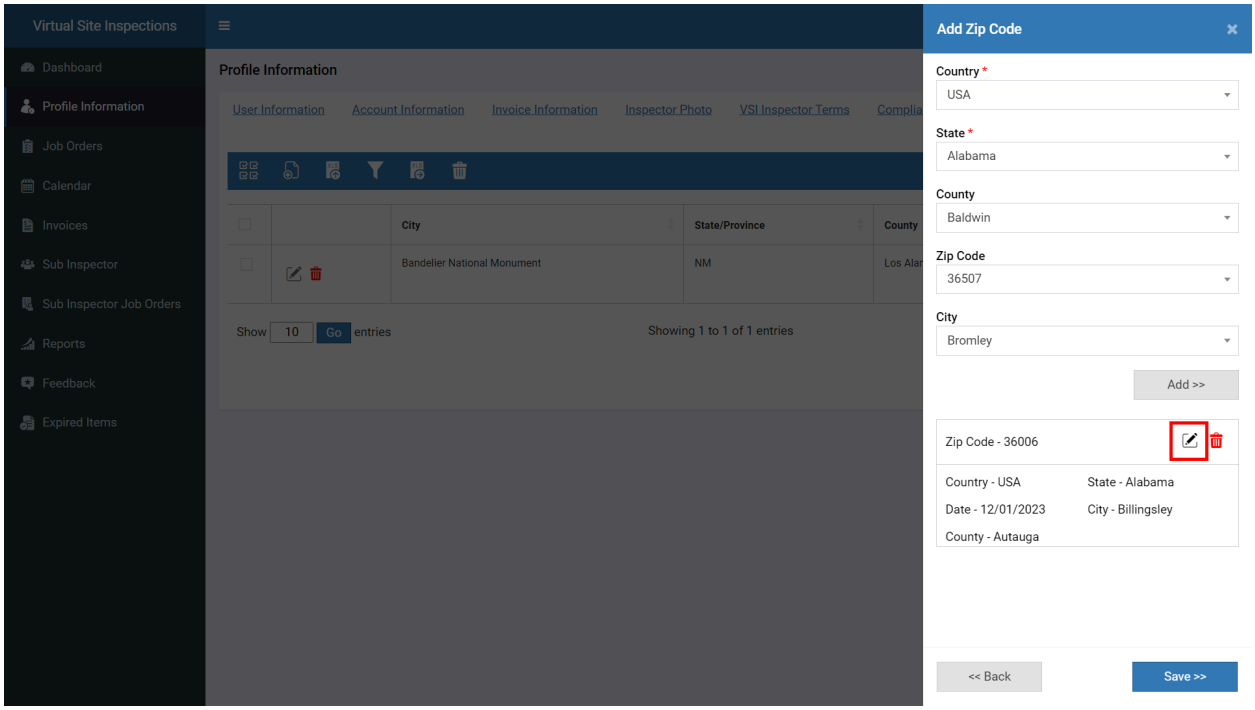
and based on that, it will load the corresponding state. After selecting the state, it will load the available county, choose a county, and it will then load the associated zip codes.Select a zip code, and it will load the available city. Clicking on the 'Add' button will input the specified information locally, displaying it below in a card view. However, it will not be stored on the server until the 'Save' button is clicked.

There is an important distinction to note: the fields for country and state are mandatory, while county, zip code, and city are optional. If we select the country and state and click on the add button, the system will automatically add all the corresponding mapping Zip Codes of the chosen country,state.

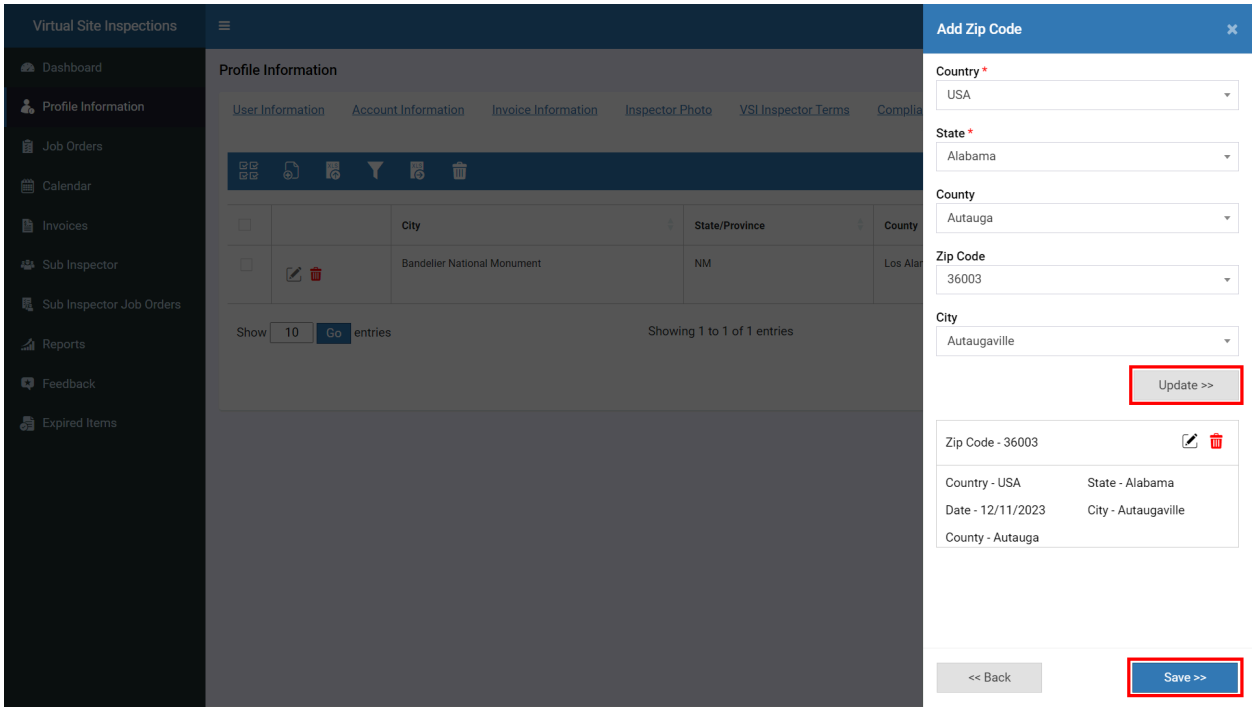
If we select the country,state and county and click on the add button, the system will automatically add all the corresponding mapping Zip Codes of the chosen state, county, and city.



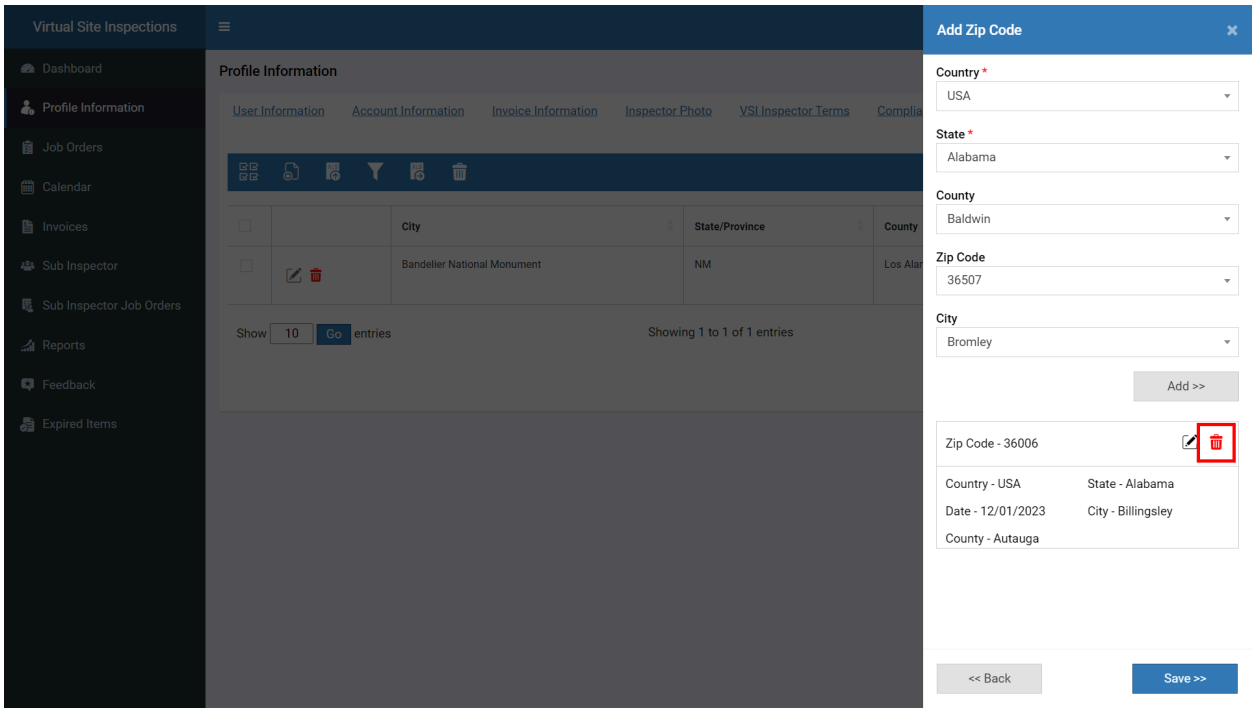
We can update and delete data directly from the card view. Additionally, it is possible to add multiple zip codes using the 'Add' button, Adding data in the card view. To edit specific data from the card view, click on the edit icon within the card view.It's important to note that adding and editing data in the card view implies that no actions are performed on the server until the 'Save' button is clicked.



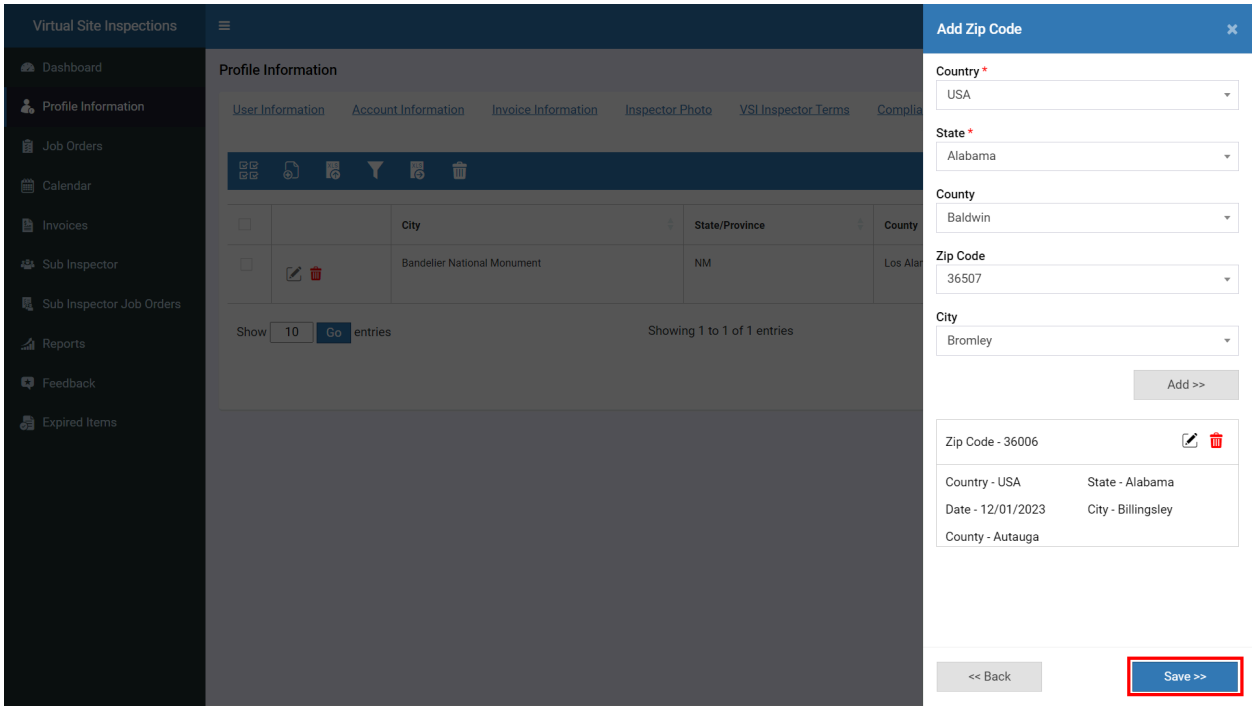
After clicking on the edit button, all values are automatically pre-selected in their respective dropdowns, such as country, state, county, zip code, and city. The 'Add' button is renamed to 'Update.' You can modify the values, and upon clicking the 'Update' button, the card view is automatically updated with the latest information, and the above dropdowns will reset.



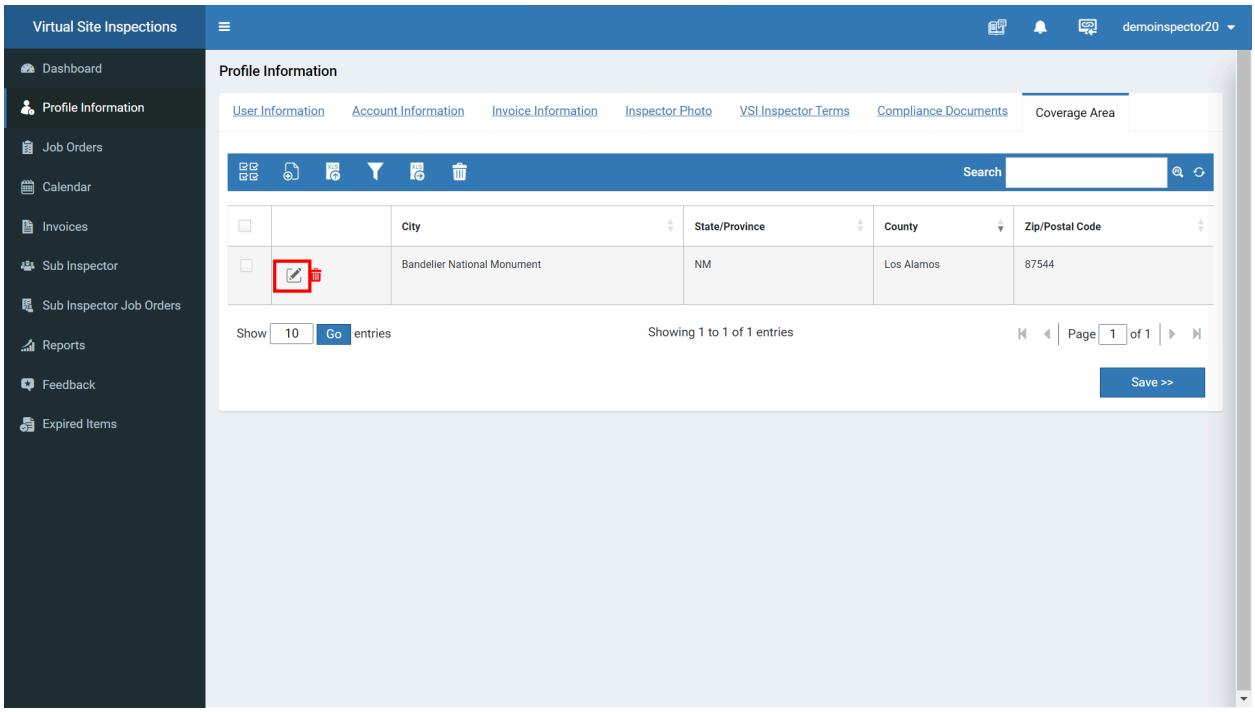
There is an additional option in the card view "Delete" providing the capability to delete data from the card view.



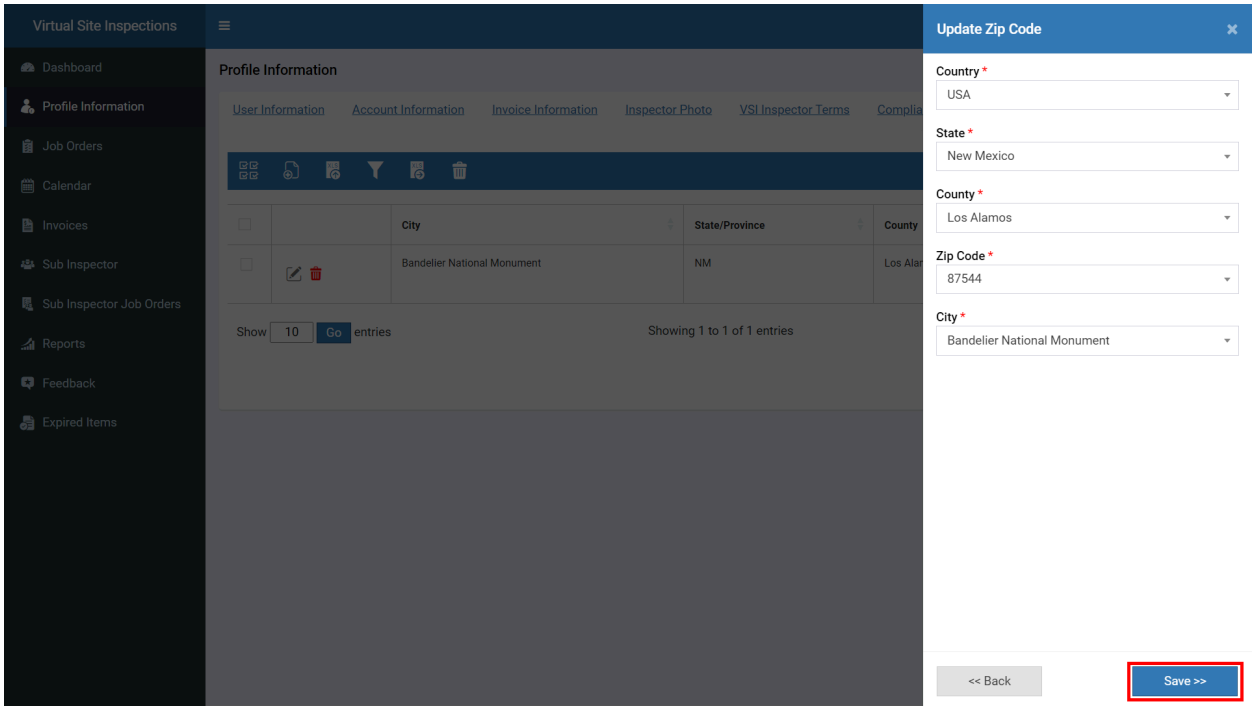
Once you've added all the zip codes in the card view, just click "Save" to store the data on the server, and it will be visible in the list.



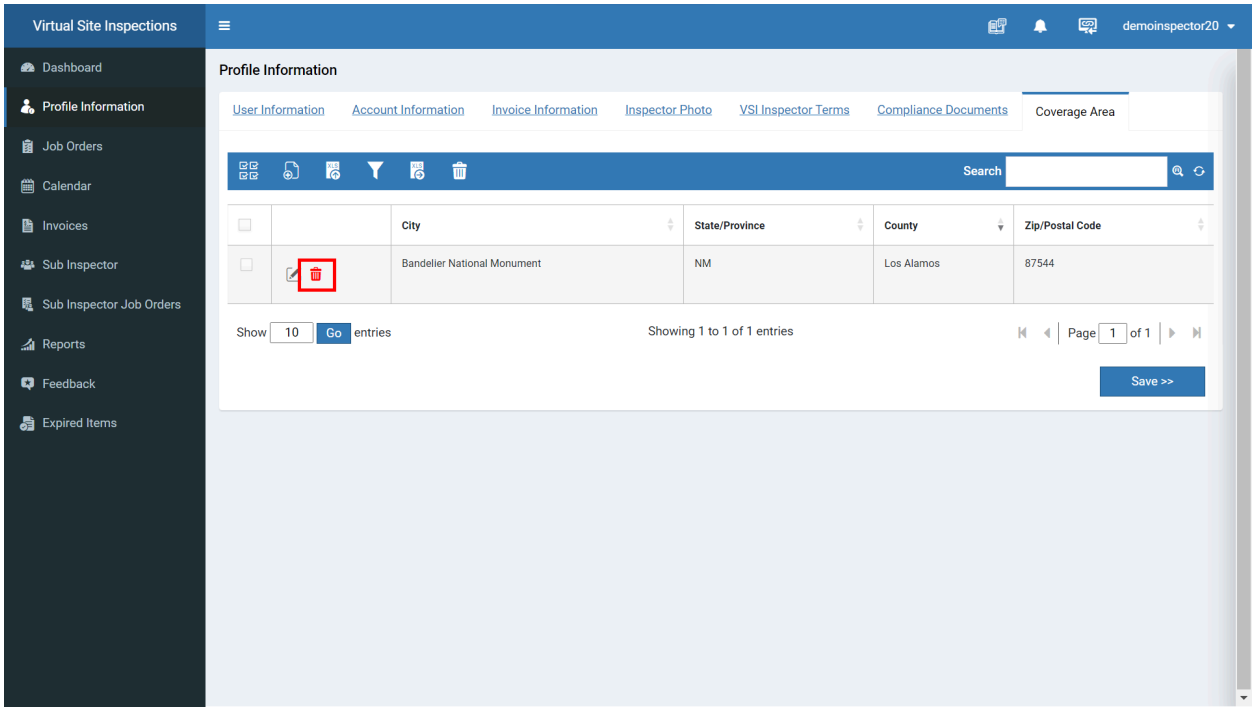
In this feature, there is an edit option to update details, as illustrated in the screenshot below.



After clicking on the edit button, a side modal will open, allowing us to update the details. After making the necessary changes, click on the "Save" button to update the list.

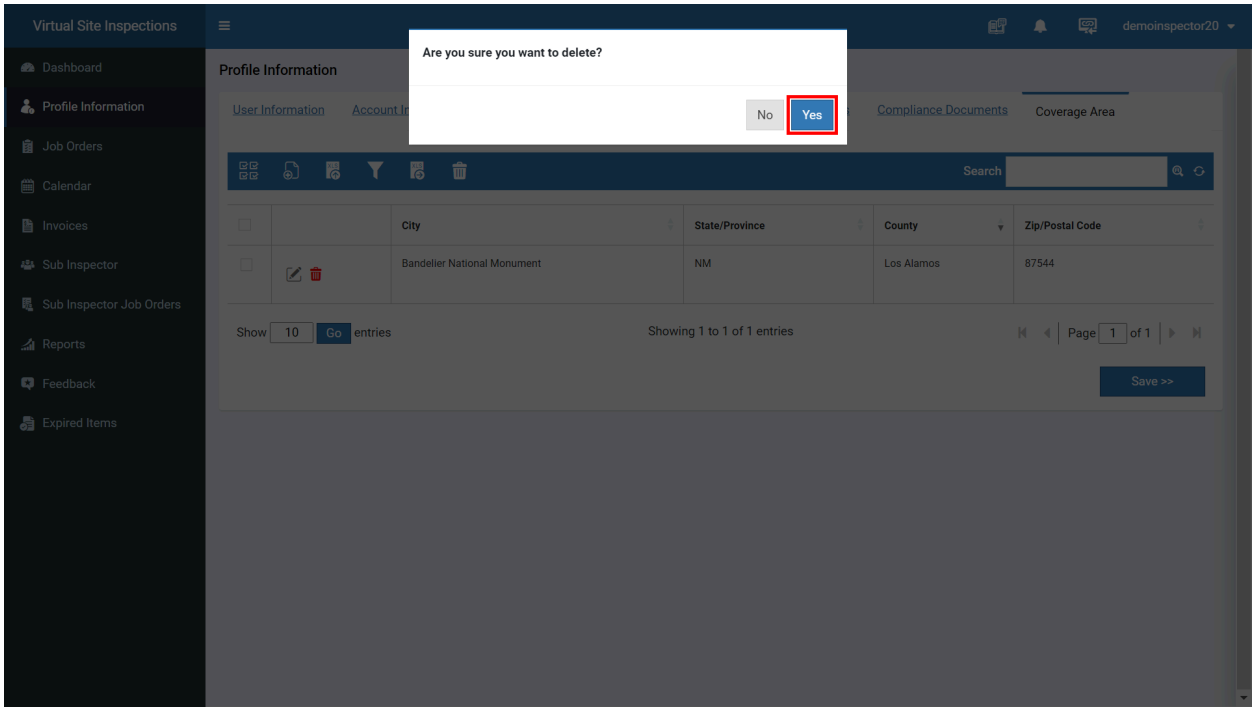


In the list, the initial column features a delete button. This button allows users to remove or delete the corresponding entry from the list.

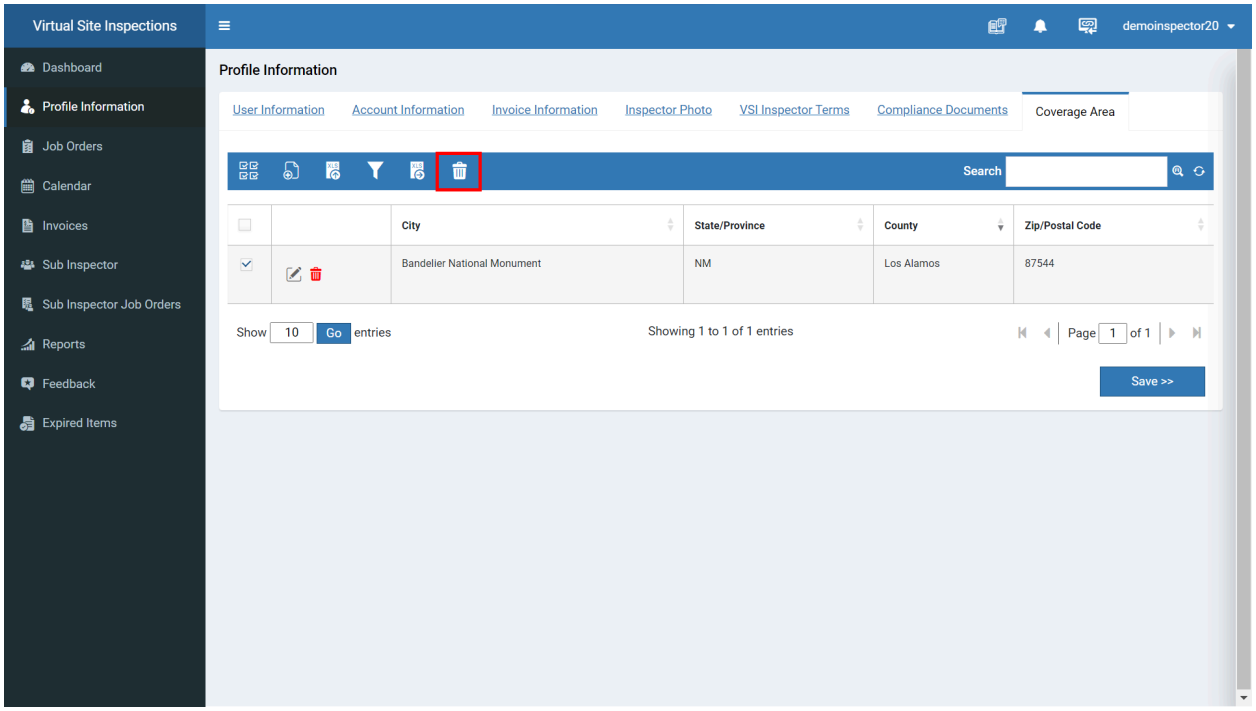


Upon clicking the 'Delete' button, a dialog box will emerge, featuring an alert with the query, 'Are you sure you want to delete ?' Within the dialog, two buttons are available. The first button,

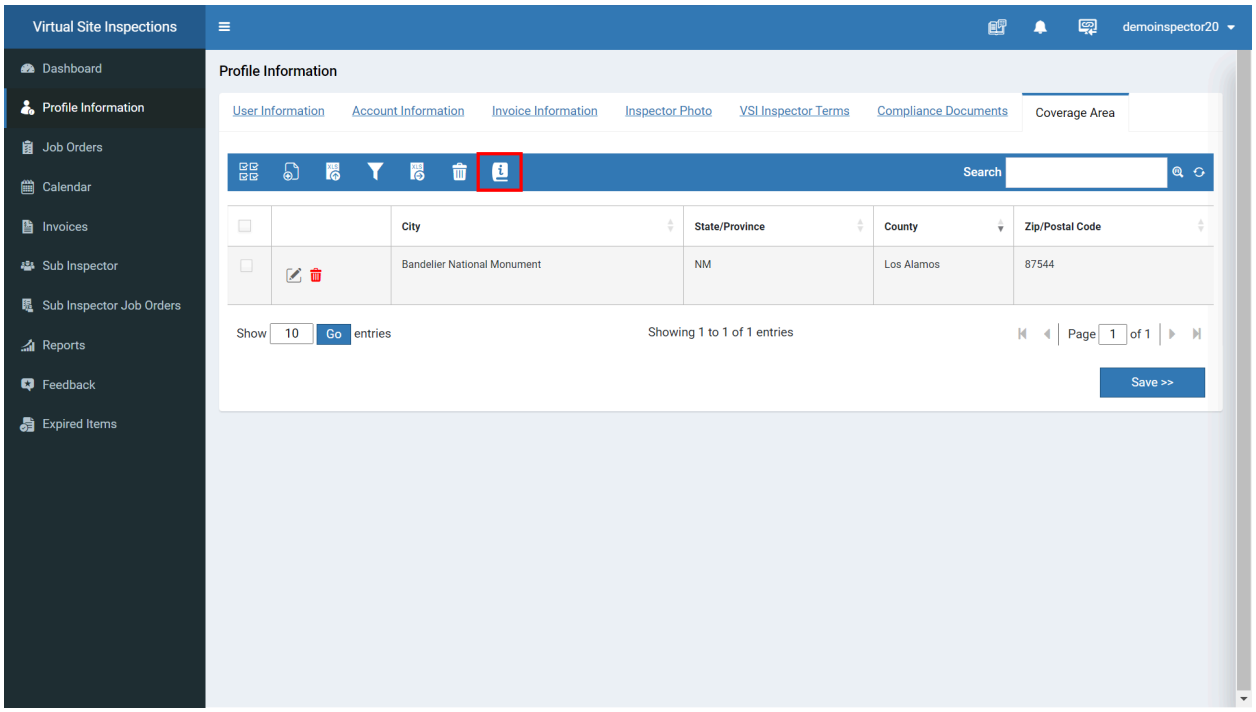
labeled 'Yes' confirms the deletion, subsequently removing the entry from the list. The second button, 'No' closes the dialog without performing any action.



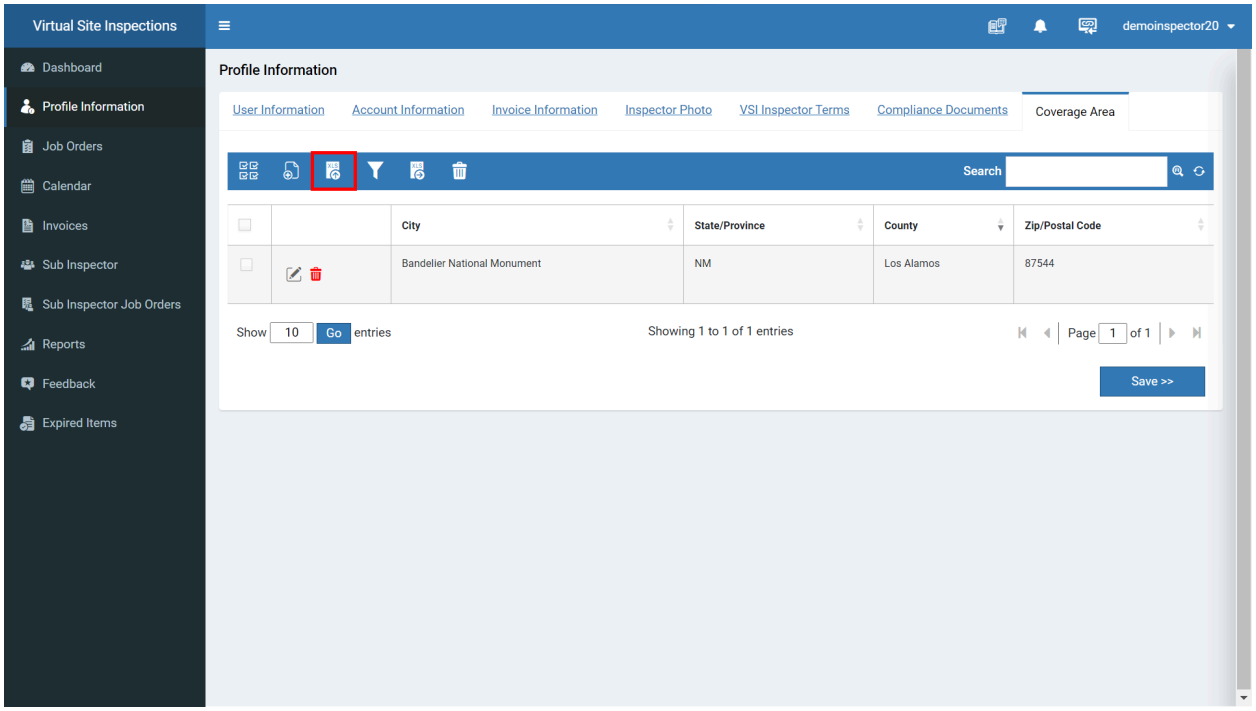
We can delete multiple coverage areas by selecting them using checkboxes and clicking on the delete button in the blue header bar icon, as shown in the screenshot below.



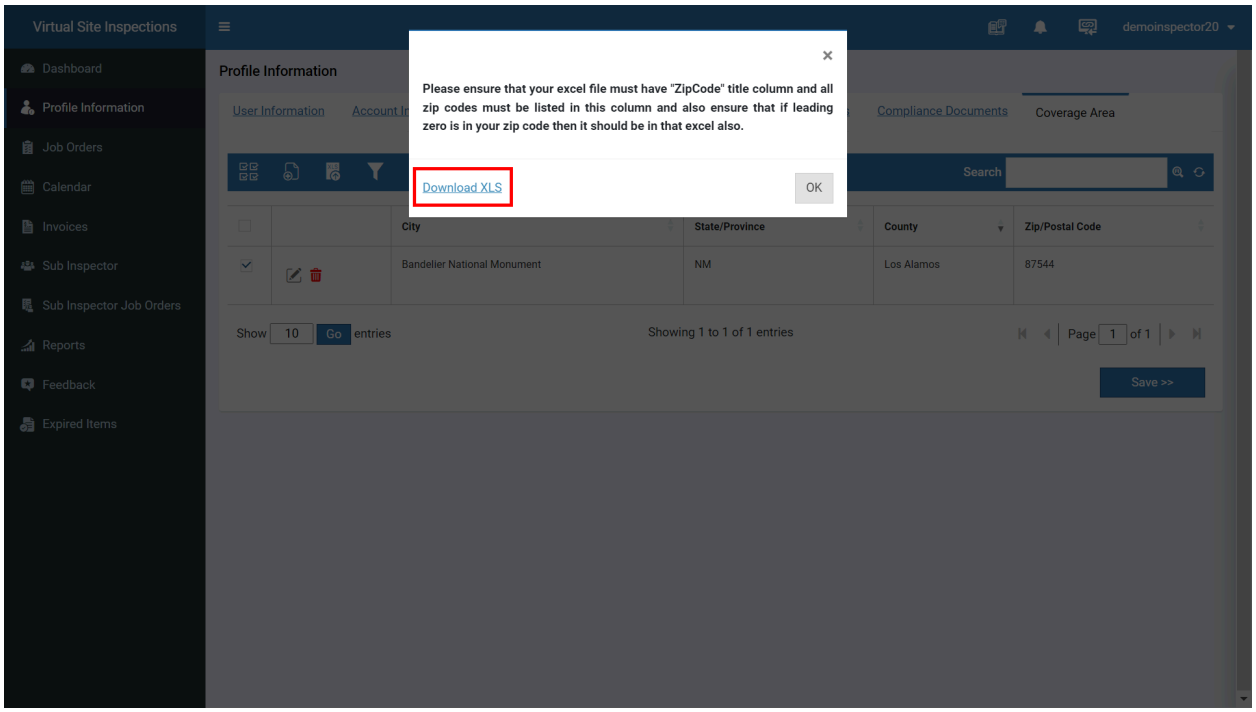
To access the coverage area user guide, click on the "Coverage Area User Guide" icon. Upon clicking, the guide will open in a new tab, allowing you to explore the document seamlessly.



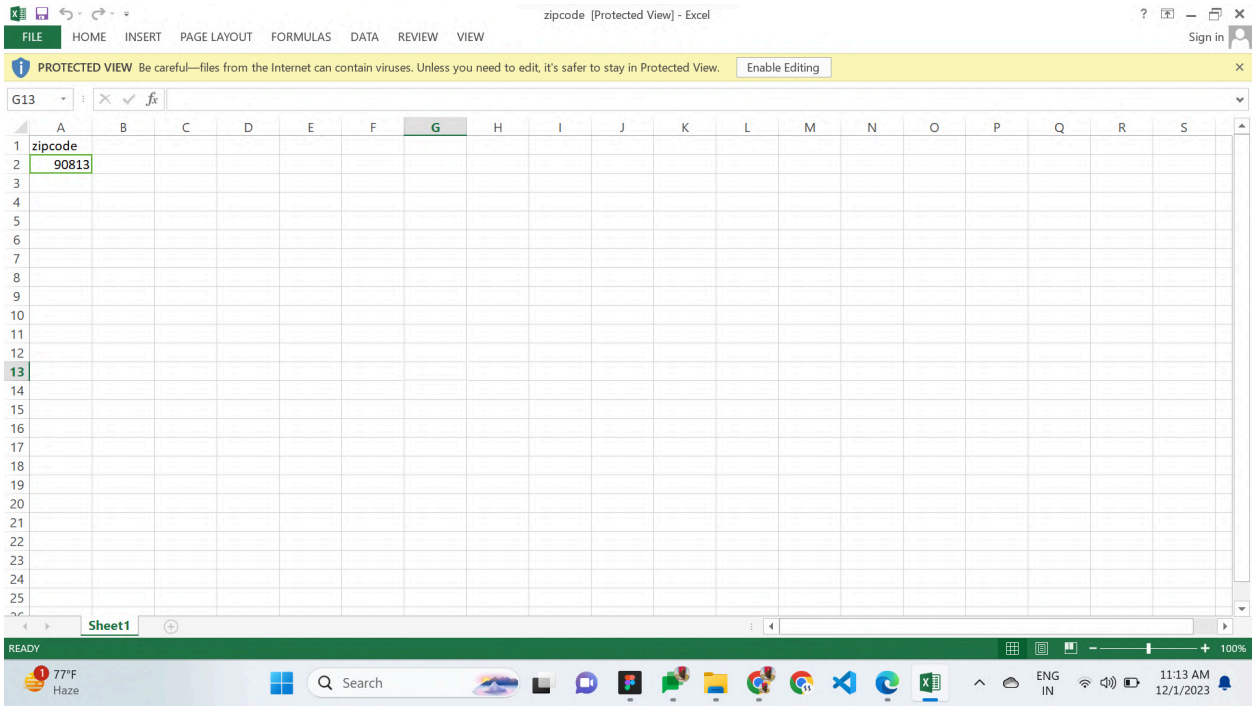
To add several coverage areas, simply click on the "Upload Multiple Zip Code" icon, shown in the screenshot below.



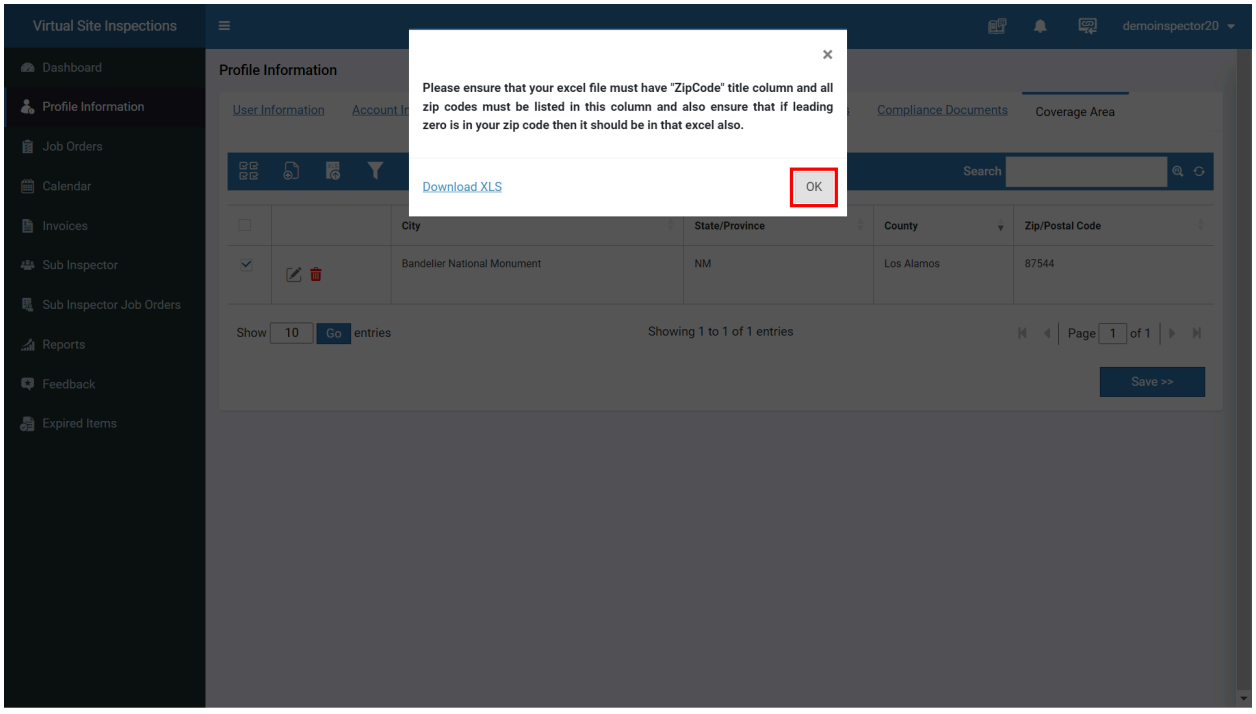
After clicking on that, it will open a dialog with guidelines, and the "Download XLS" link will download the XLS file with a predefined format. Clicking on "Download XLS" will save the file on our system.



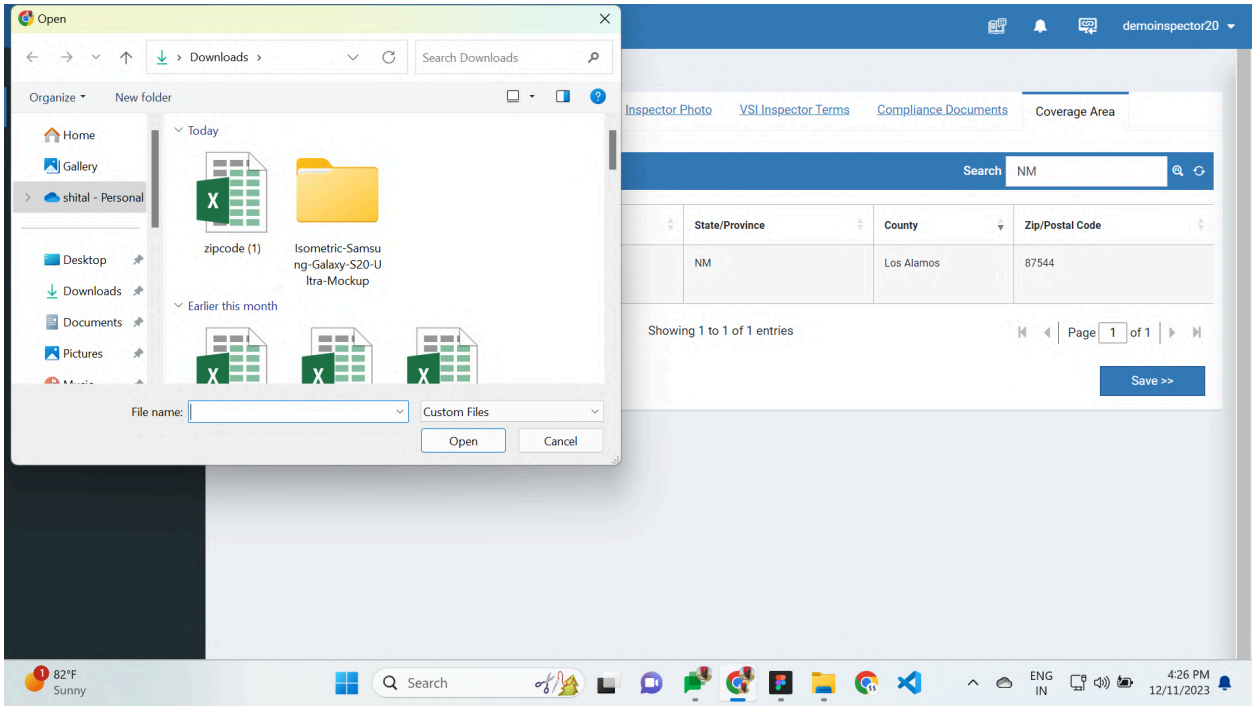
When you open the XLS file, it displays a column labeled "Zip Code". To update the file, you need to add the zip codes to this specific column.



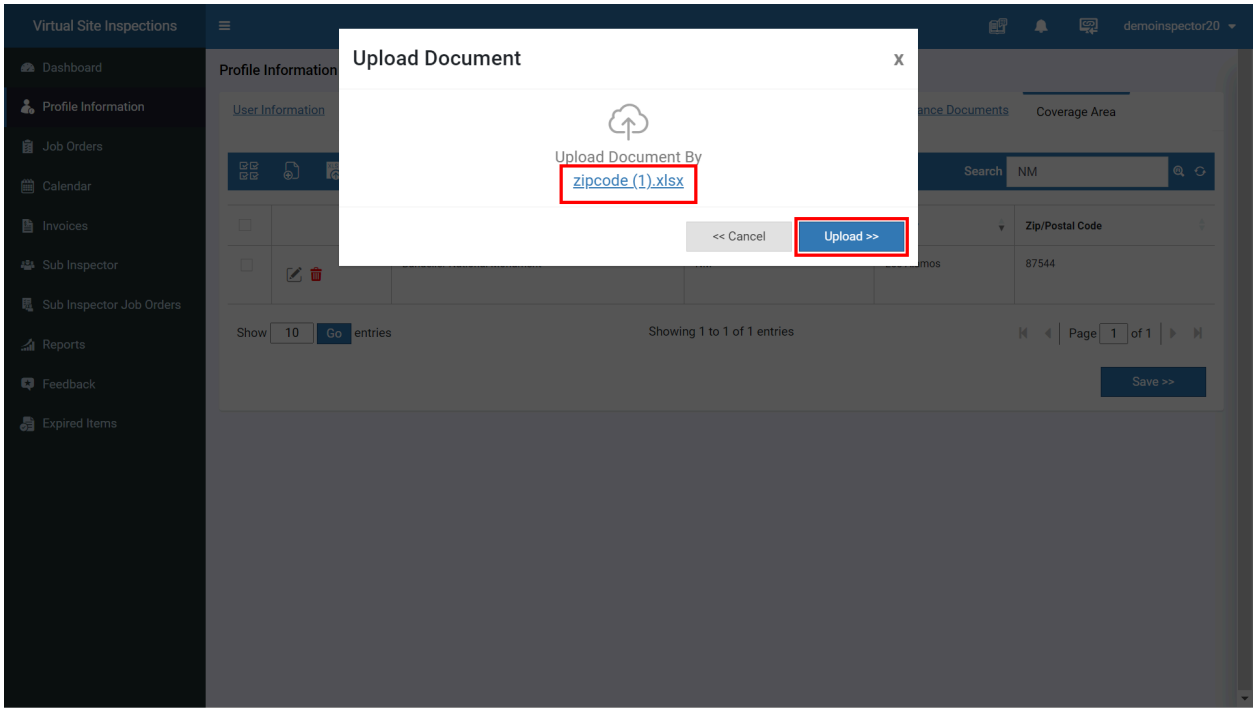
To upload the updated file after adding zip code, Click on the "OK" button, as shown in the screenshot, to initiate the upload process.



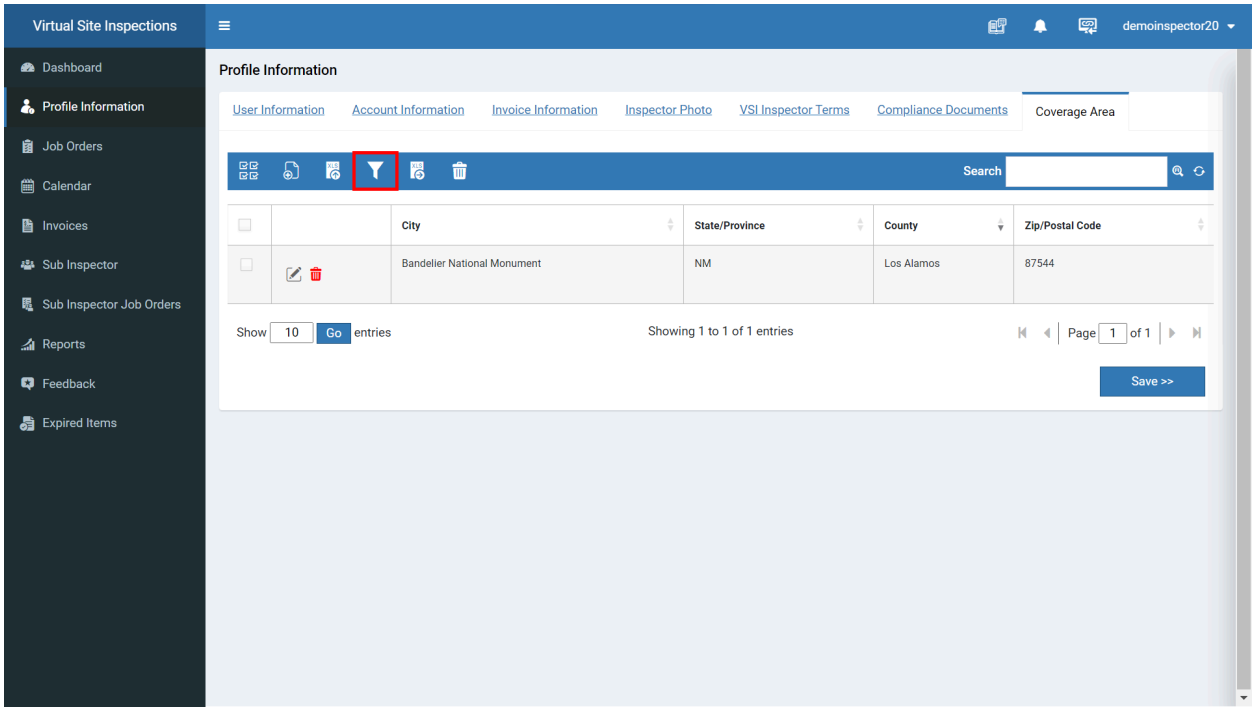
After clicking the button, a system dialog will open, allowing you to choose your file for upload.



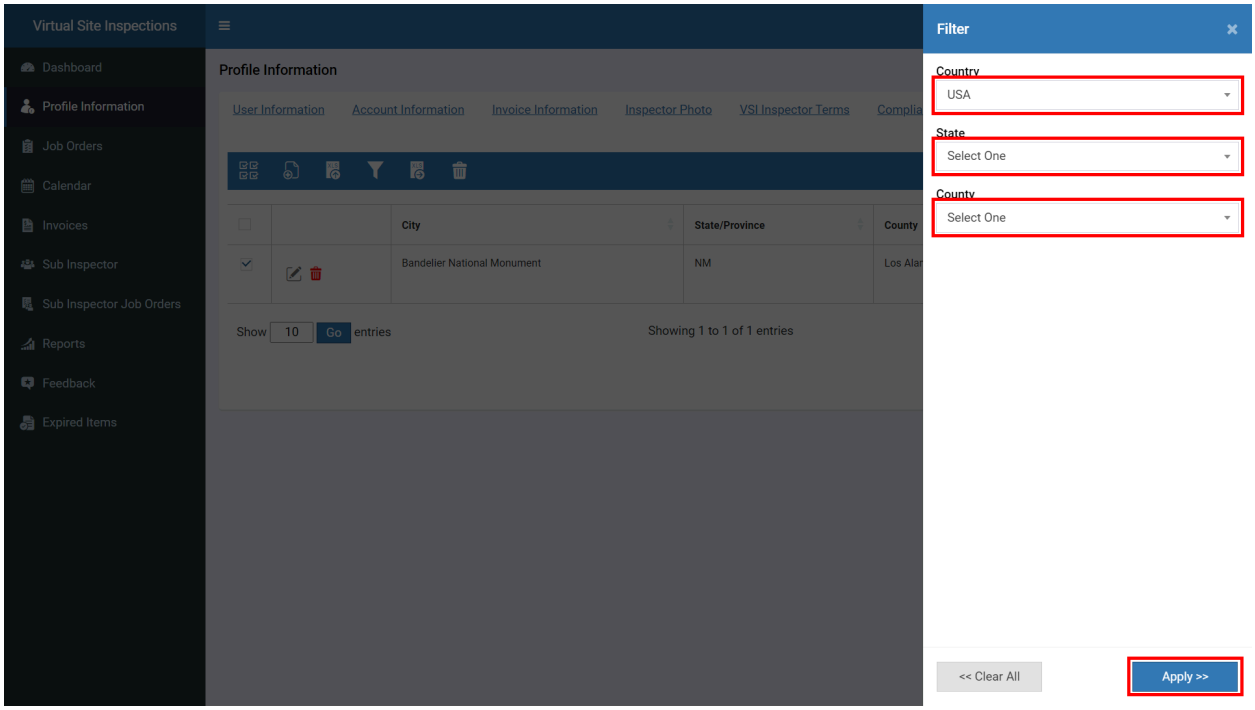
After clicking the "Open" button, a dialog will appear showing the selected file name. If you want to change the file, click on the file name, and you can modify the file. To upload the file, click on the "Upload File" icon. This action will add all the coverage areas from the file to the list.



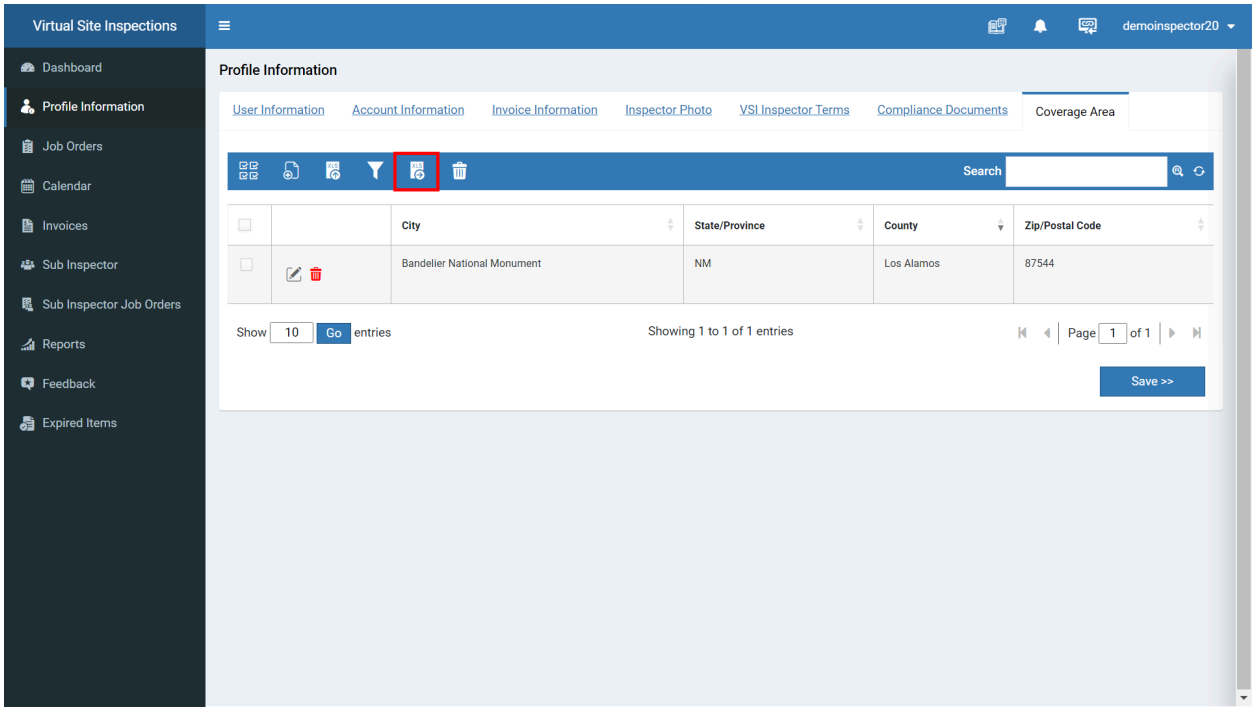
We can filter coverage areas by clicking on the filter icon, as highlighted in the screenshot below.



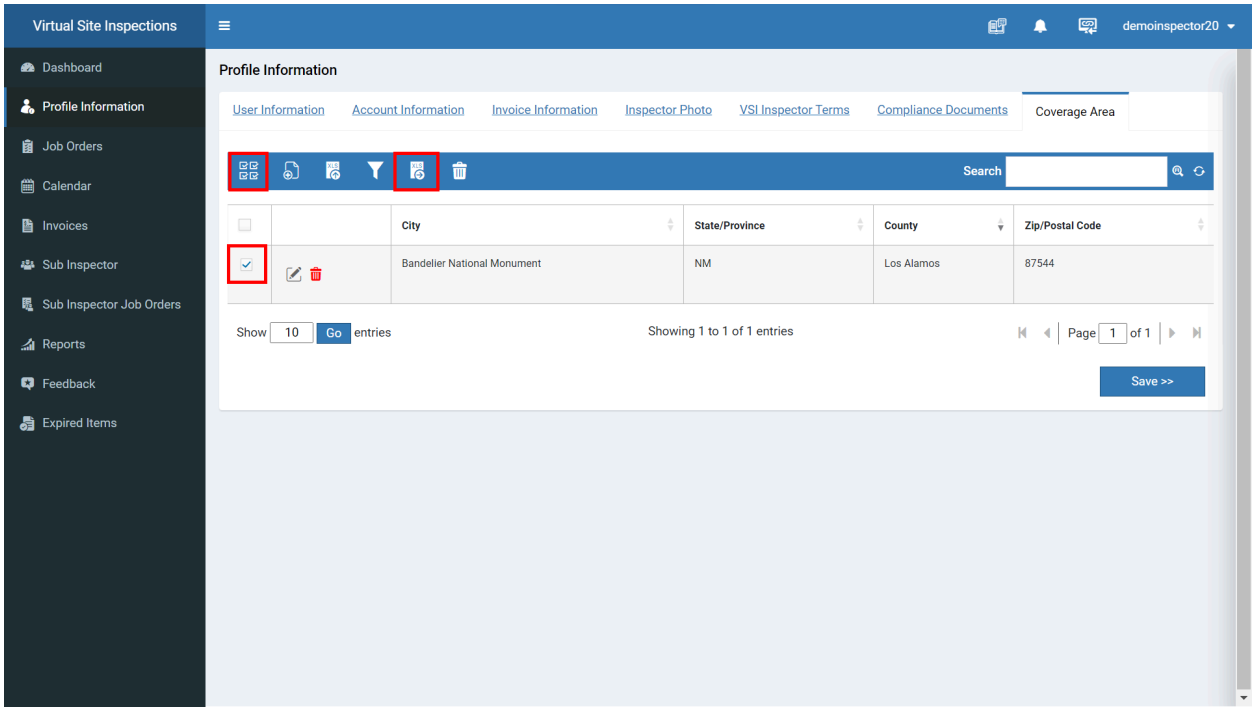
After clicking on the filter icon, it will open a side modal where you can filter by country, state, and county. After selecting the desired values, click on the "Apply" button. This action will filter the data in the list accordingly.



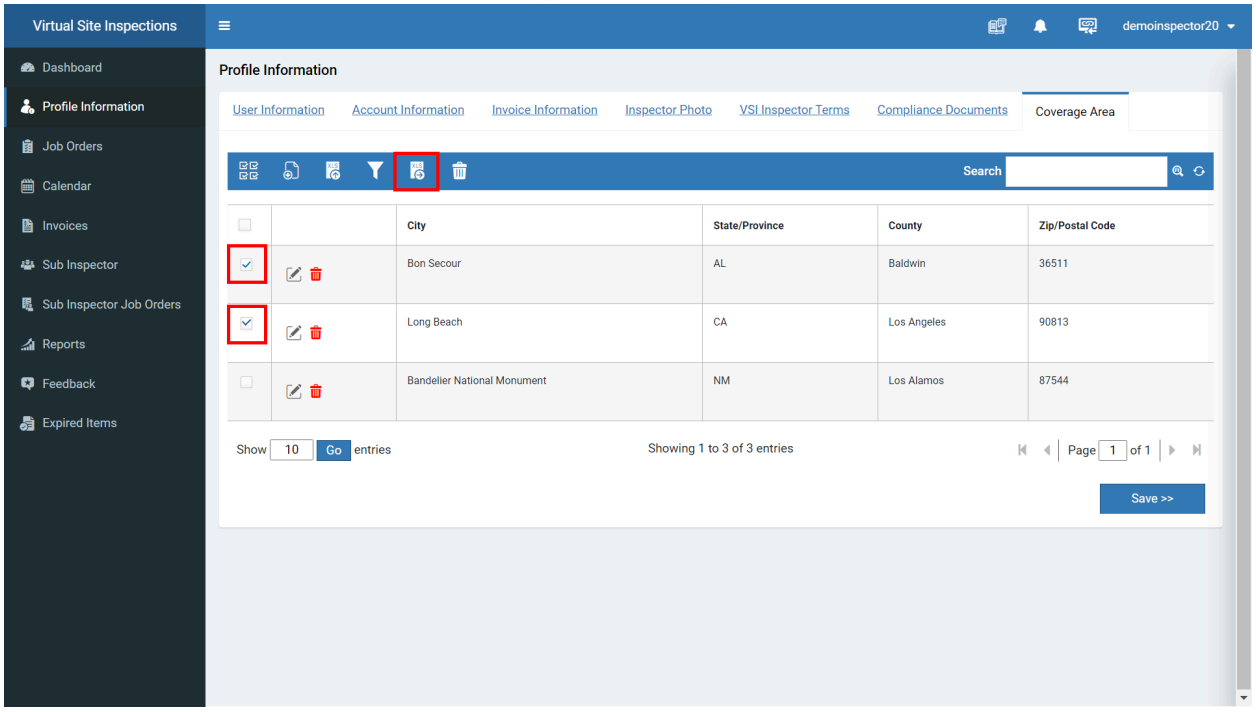
To export the coverage area, click on the 'Export to XLS' icon, as shown in the screenshot below.



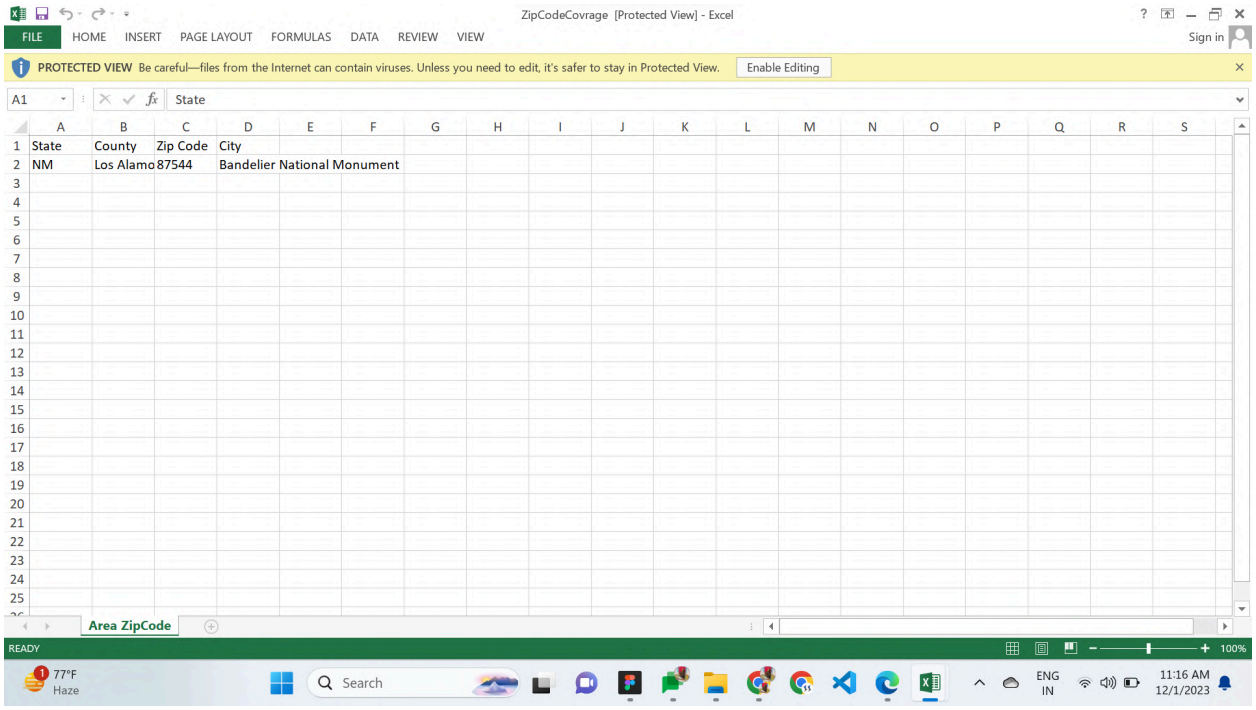
If you want to download all coverage areas, click on the 'Select All' icon, and then click on the 'XLS File' icon. This action will download an XLS file containing all the zip codes.



If you want to download a particular coverage area, select it and click on the 'Export XLS' icon.

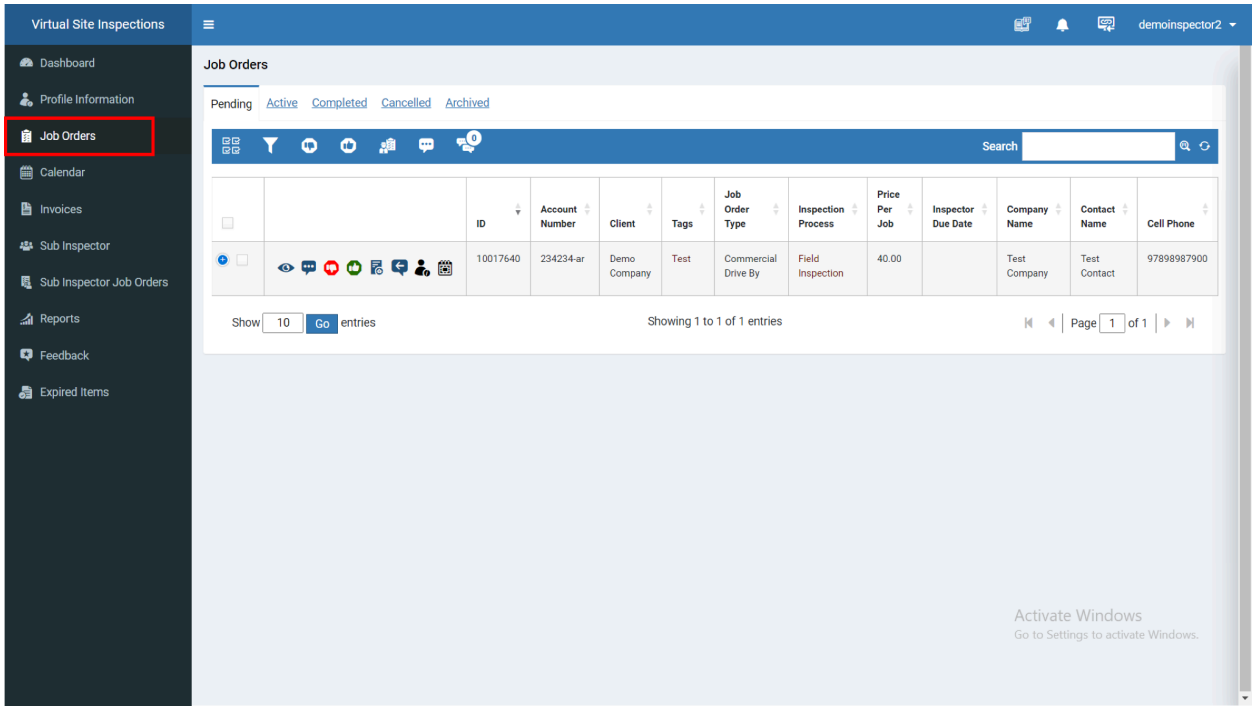


Here, you can view the data of the downloaded file.



Job Order

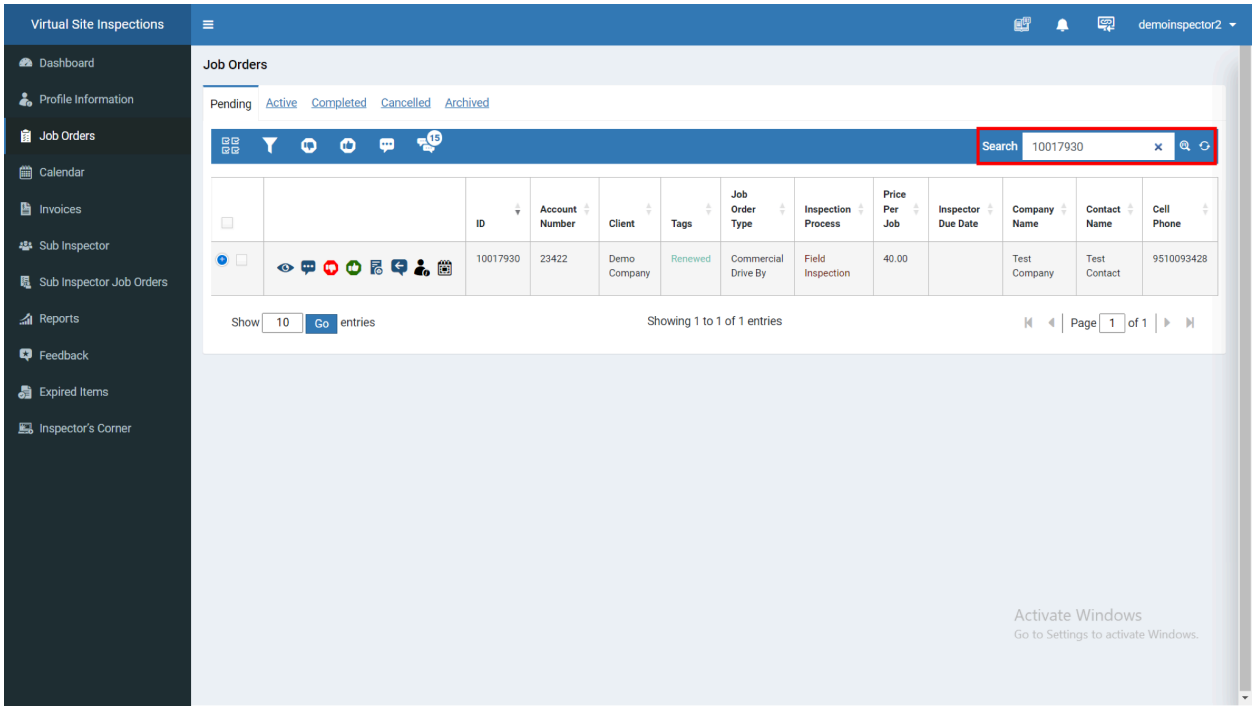
Inspectors can view job orders assigned to them by clicking on the 'Job Orders' menu in the left-side panel. This action redirects users to the Job Orders List page.



Within the job order, there are various tabs such as Pending, Active, Completed, Cancelled, and Archived. Clicking on a specific tab loads a corresponding job order list for that status and displays blue header options based on the selected status.

The Job Order List encompasses various functionalities, such as view orders, edit orders, decline orders, accept orders, accessing property details, viewing user information, booking appointments, checking special instructions, assigning sub-inspectors, downloading available documents, providing decline reasons, and sending appointment links. These functionalities are presented based on specific tabs.

To search for a job order using a keyword, the system performs the search across various parameters, including Transaction ID, Account Number, client, tags, job order type, company name, cell phone, onsite email contact, address, city, state, county, and zip code. Enter your search term in the highlighted search field, as illustrated in the provided screenshots, and then press enter or click on the finder icon next to the text field. The system will then display a list of relevant job order records.



Pending Tab

The "Pending" tab displays job orders assigned to inspectors by the administrator. When selecting the "Pending" status, the blue header bar presents options including "Select All", "Filter", "Accept", "Decline order", "Assign multiple jobs", "Message" and "Message Count".

Select All

The "Select All" option is utilized to select all job orders within the respective tab. When you click on the "Select All" option, it will automatically mark all the job orders listed in that particular tab.

Filter

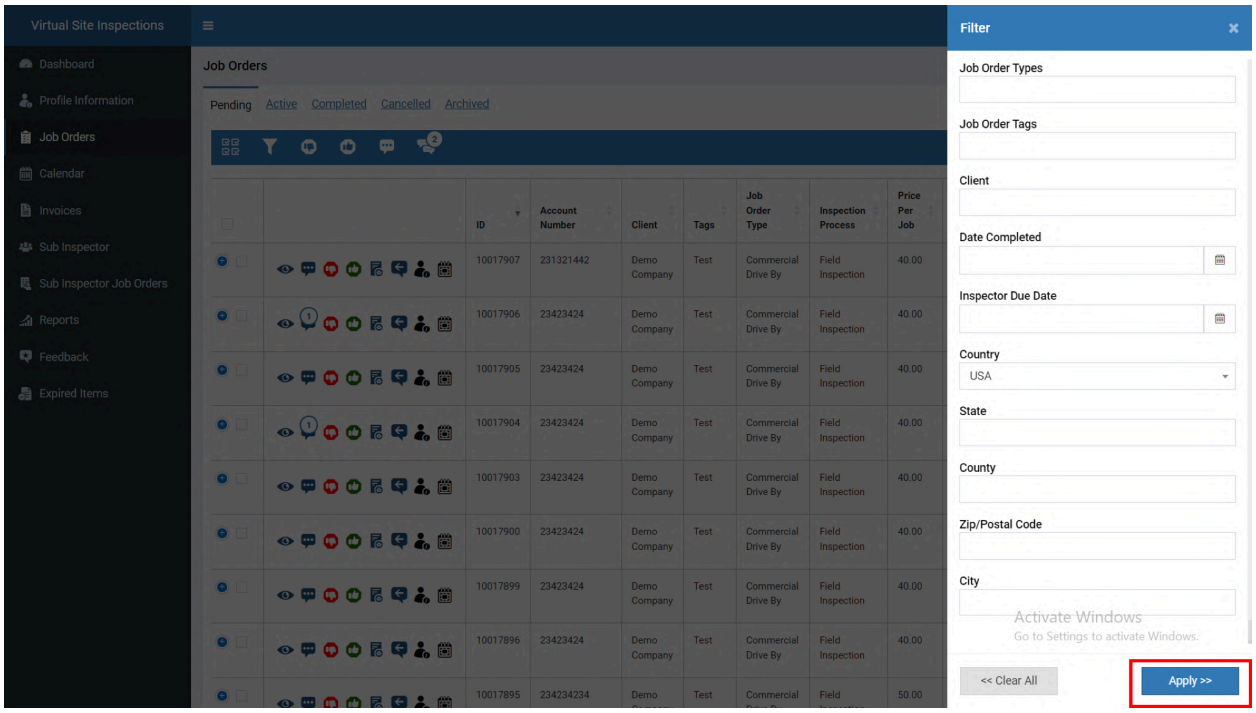
Filters functionality includes fields such as Job Order Types, Job Order Tags, Client, Country, State, County, Zip/Postal Code, City, and Inspector Due Date,Date completed. Users can select values from the dropdown menus for Client, Country, State, County, Zip/Postal Code, City, Job Order Types, and Job Order Tags.

For the Inspector Due Date and Date Completed, users can choose a value from the date picker, specifying a specific range from the "From" date to the "To" date.

Additionally, there is an interconnected feature: if a country is selected, the state dropdown will dynamically load options based on the chosen country. Similarly, selecting a state will load options for county and zip code or postal code will dynamically load options based on the chosen state.Similarly, selecting a county will load options for city and after selecting city will

dynamically load options for zip code/ postal code. This interconnected filtering system enhances the precision of selecting criteria in the "Pending" tab.

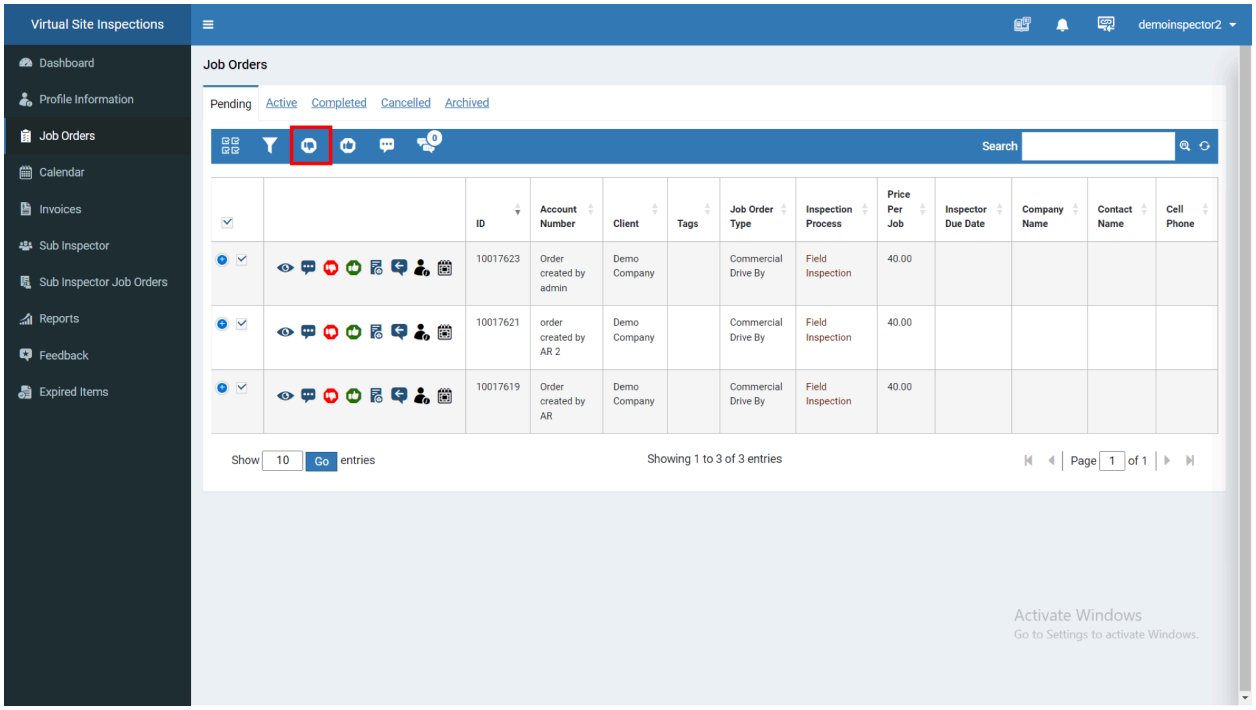
Upon selecting values from the filters, click on the "Apply" button. This action will retrieve and display relevant job order data in the list based on the specified filter criteria.Conversely, clicking the "Clear All" button will reset both the job order list and the Filters fields, restoring them to their default states.



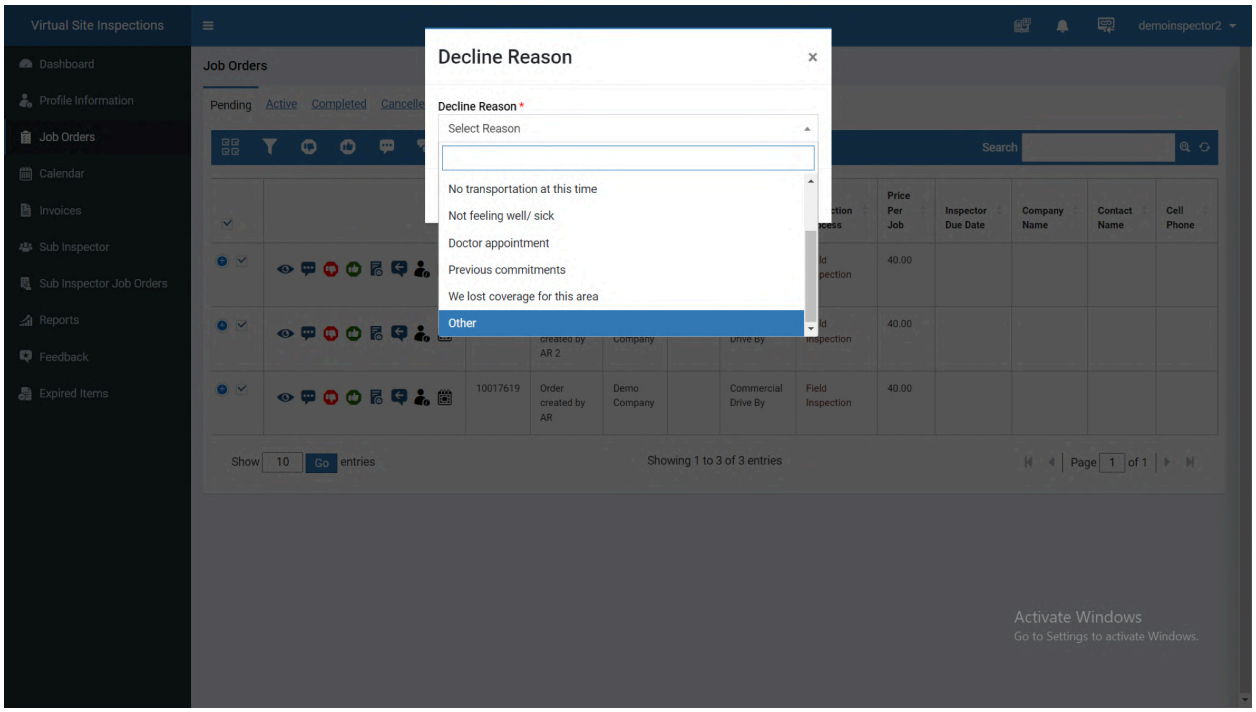
Decline Order

Inspectors have the ability to decline a job order if they choose to do so, utilizing the decline functionality.

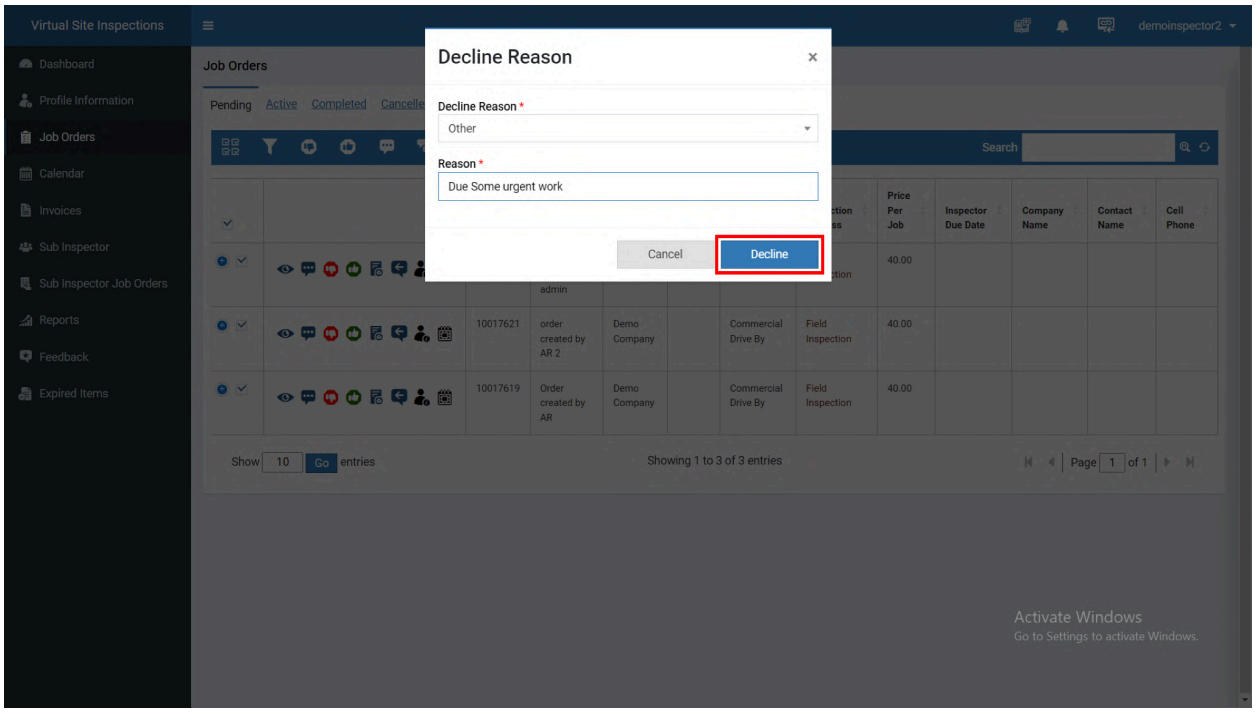
To decline job orders, select the desired orders and click on the decline icon located in the blue header bar.



After clicking on the decline icon, a dialog box will open. In this dialog, the inspector needs to select the reason for declining the job order. If a custom reason is desired, the inspector can choose the "Other" option.

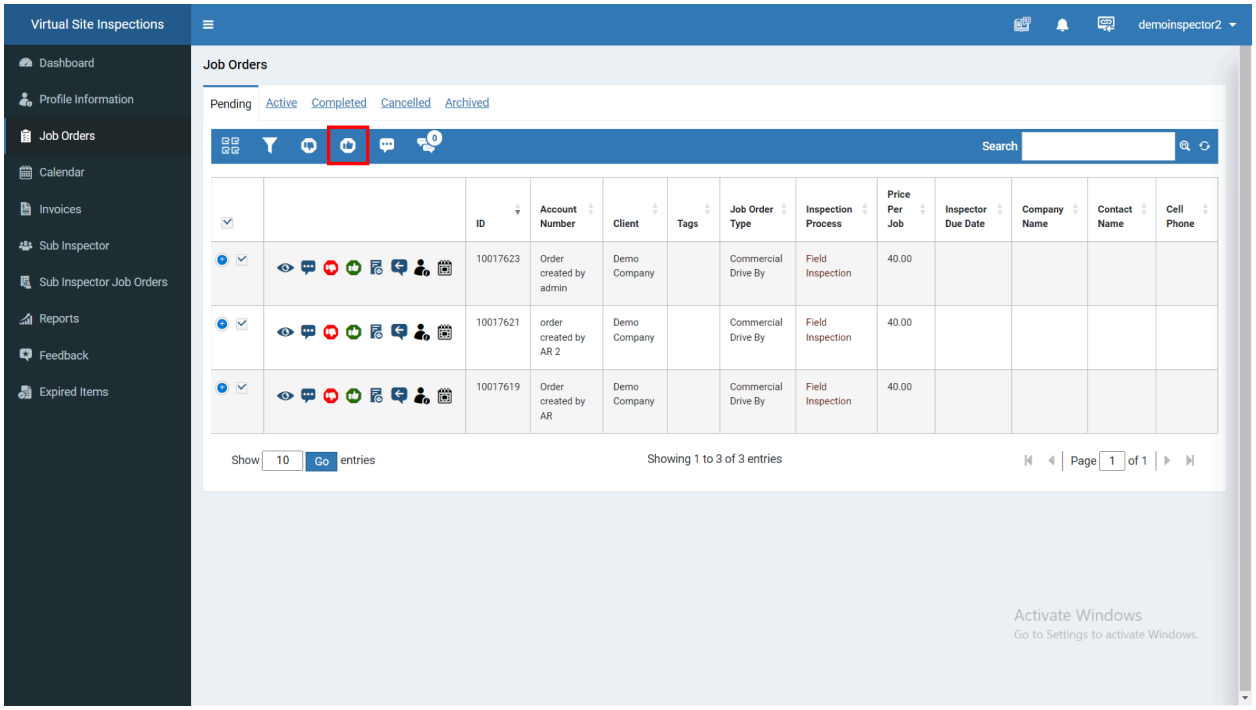


After selecting the "Other" reason, a label and text box will appear. Upon entering the custom reason, clicking on the decline icon will decline the order and it will return to the admin's new tab, automatically removing it from the pending tab.



Accept Orders

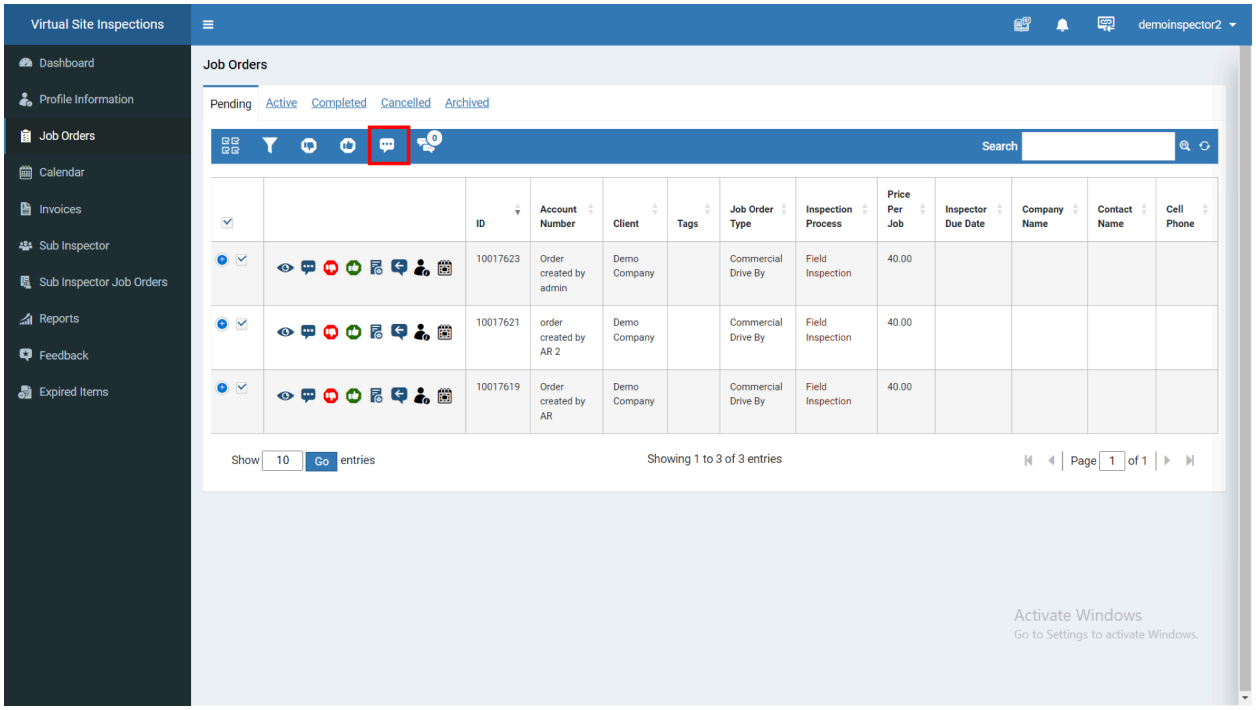
Inspectors have the ability to accept multiple job orders if they choose to do so, using the Accept Order functionality. To accept job orders, select the desired orders and click on the accept icon located in the blue header bar. By accepting the orders, you confirm your commitment to conduct the inspections associated with the job orders.



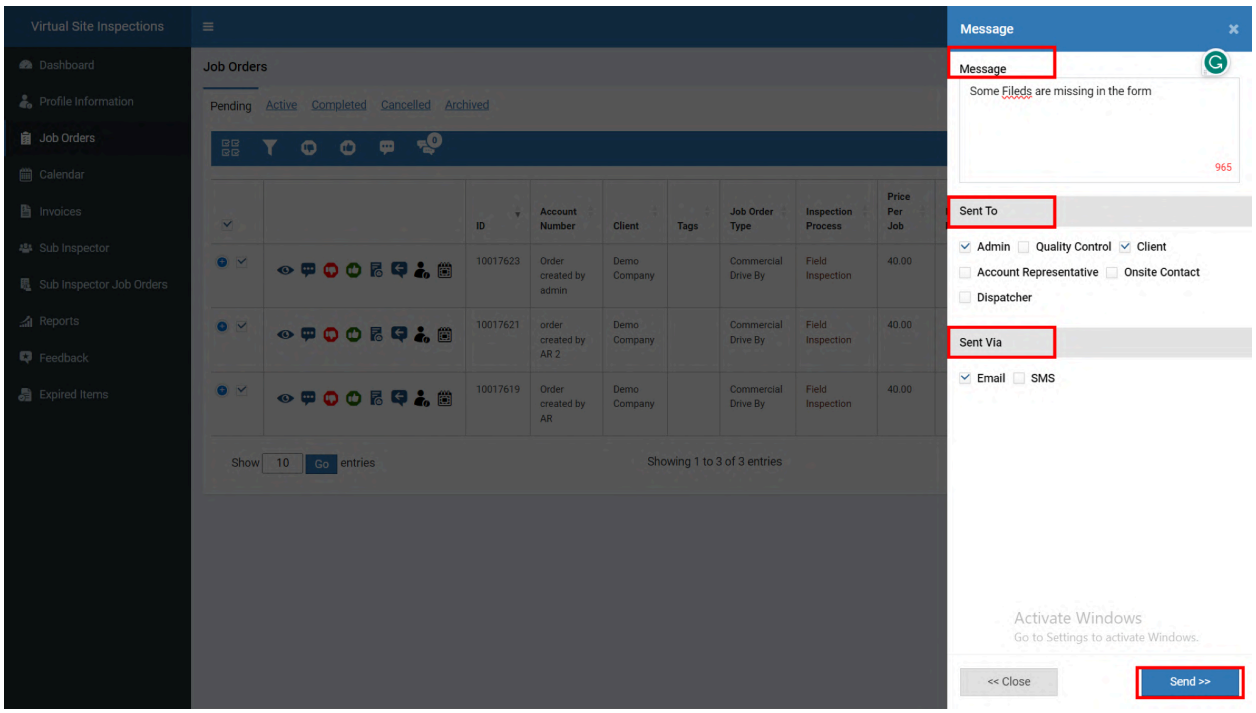
After clicking on the accept icon, all the selected job orders will be moved to the active tab.

Message

The "Message" functionality allows users to send messages to various recipients such as Client, Quality Control, Account Representative, Admin. To send a message, you need to select more than one job order, and then click on the message icon, as illustrated in the provided screenshot.

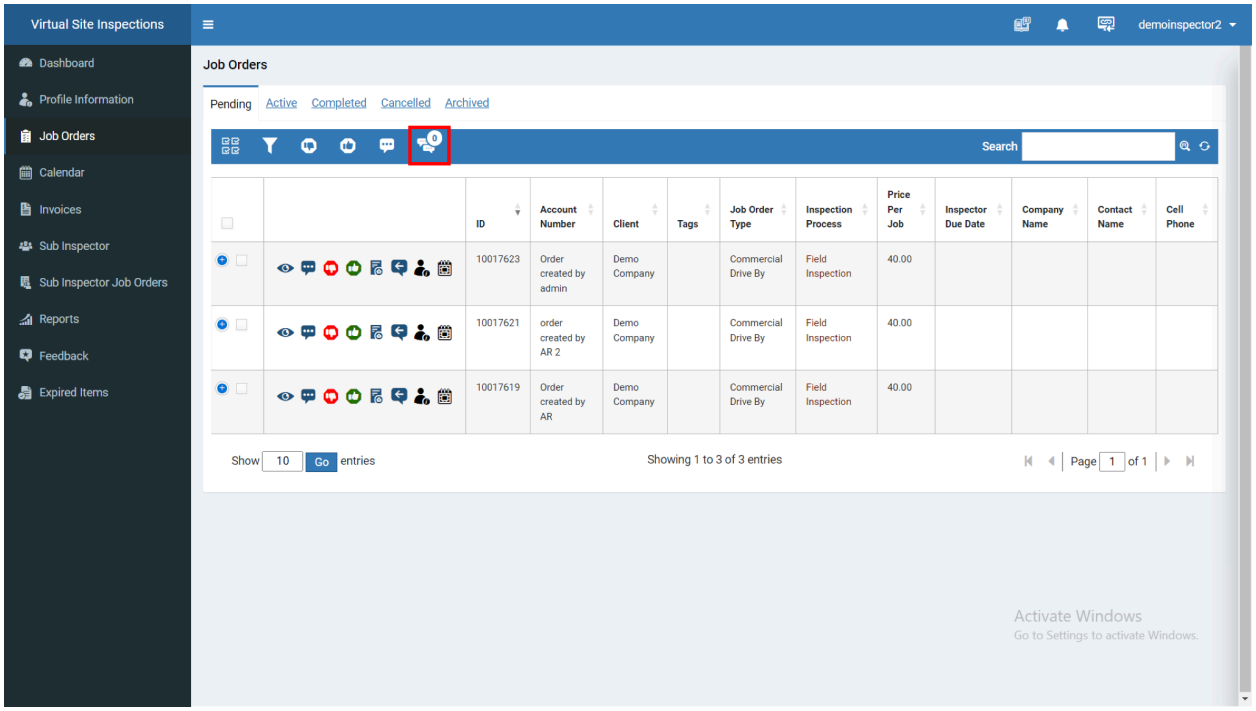


After clicking on the message icon, a pop-up will appear, prompting you to input the message content. In this pop-up, you can add your message and select the recipients from the "Sent To" section. Additionally, you can choose the channel through which the message will be sent by selecting the appropriate option in the "Sent Via" section. Now, hit on the ‘Send >>’ button to send the message.



Message Count

The Message Count icon, visible within the job order list, serves as an indicator of incoming messages associated with each respective job order and is yet to view(Pending for view). When the user interacts with this icon and clicks on it, the system responds by revealing a list of job orders specifically tied to messages. This functionality allows users to efficiently access and manage job orders that have associated messages, enhancing the overall user experience, as illustrated in the accompanying screenshot.



Active Tab

When you click on the "**Active**" status, it shows job orders that have been accepted by inspectors.

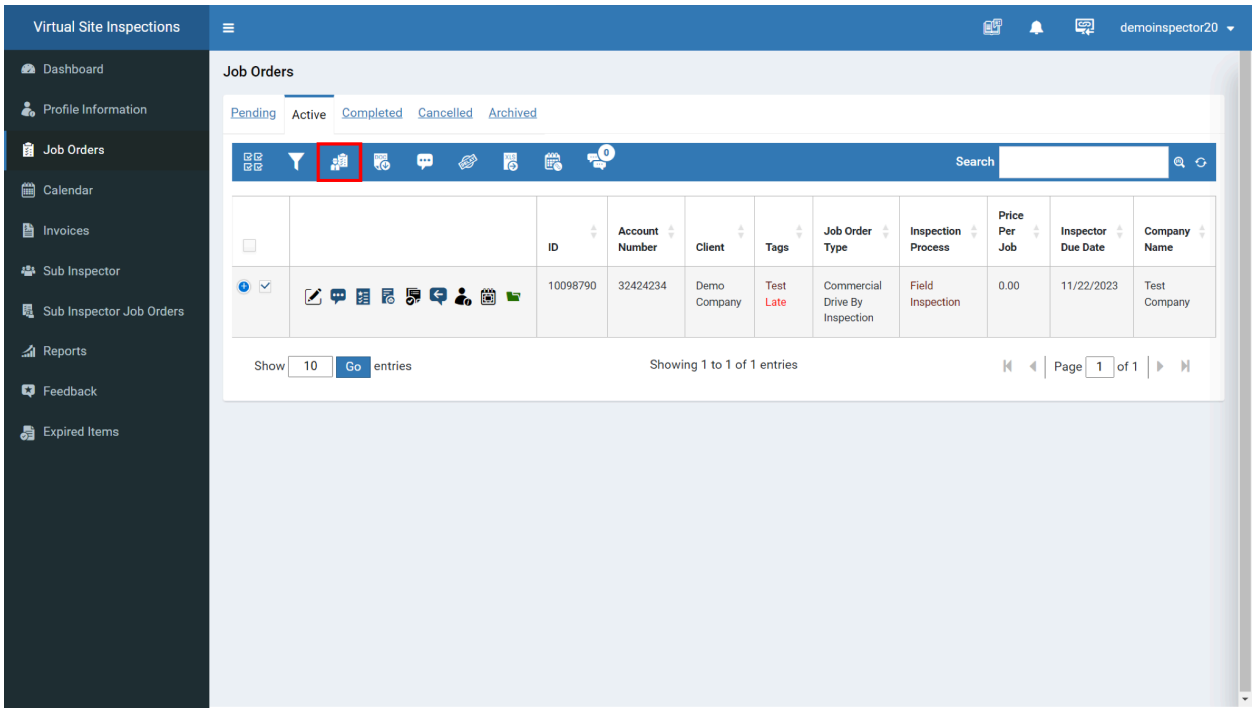
When selecting the "Active" status in the blue header bar, it offers options such as "Select All", "Filter", "Assign multiple job sub-inspector", "Download Document", "Message", "Mark as Delay", "Export Job Orders", "Book Appointment" and "Message Count".

Active Tab Filters functionality includes fields such as Country, State, County, Zip/Postal Code, City, Job Order Types, Job Order Tags, Sub Inspector, Client, Inspector Due Date. Users can select values from the dropdown menus for Sub Inspector, Country, State, County, Zip/Postal Code, City, Job Order Types, Client, and Job Order Tags.

In the "Active" tab, you can perform the same actions as explained above for the New tab for the fields: "Select All", "Filter", "Message" and "Message Count".

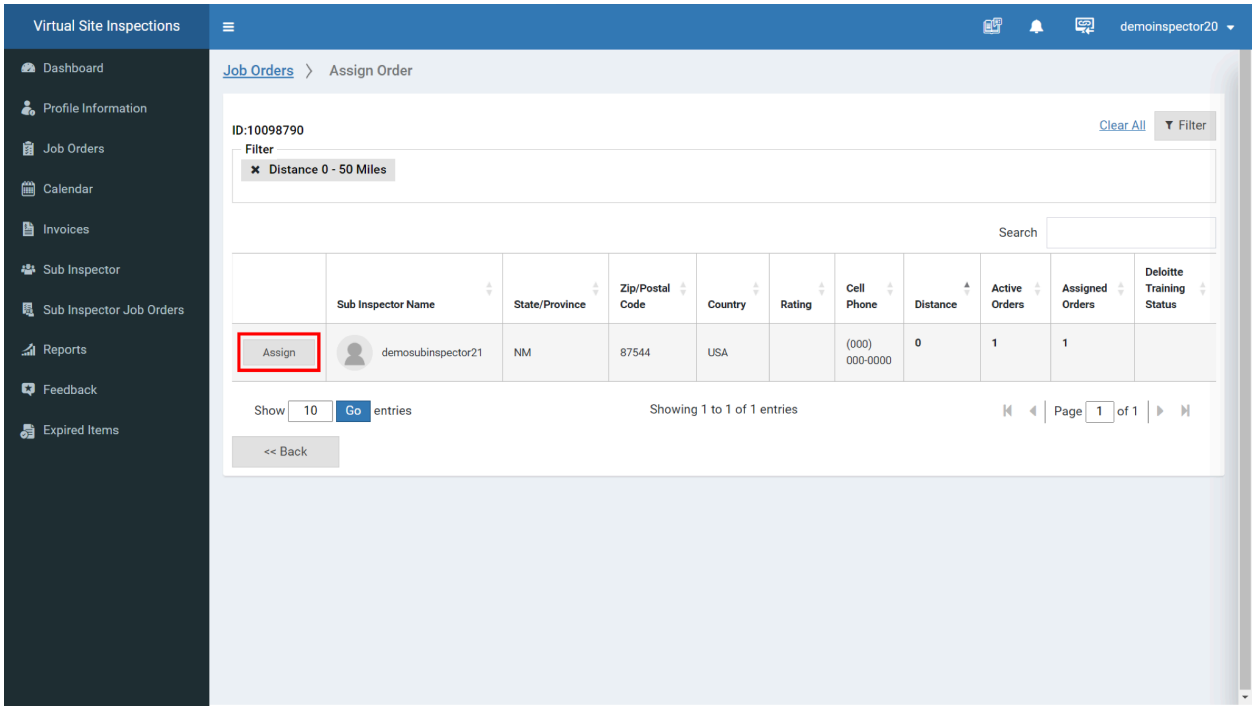
Assign Sub-inspector to Multiple Job

Assigning multiple jobs to sub-inspector functionality allows inspectors to assign job orders to sub-inspectors. To utilize this feature, the inspector should select the desired job orders and click on the "Assign Multiple Job - Sub Inspector" button as shown in the screenshot below.

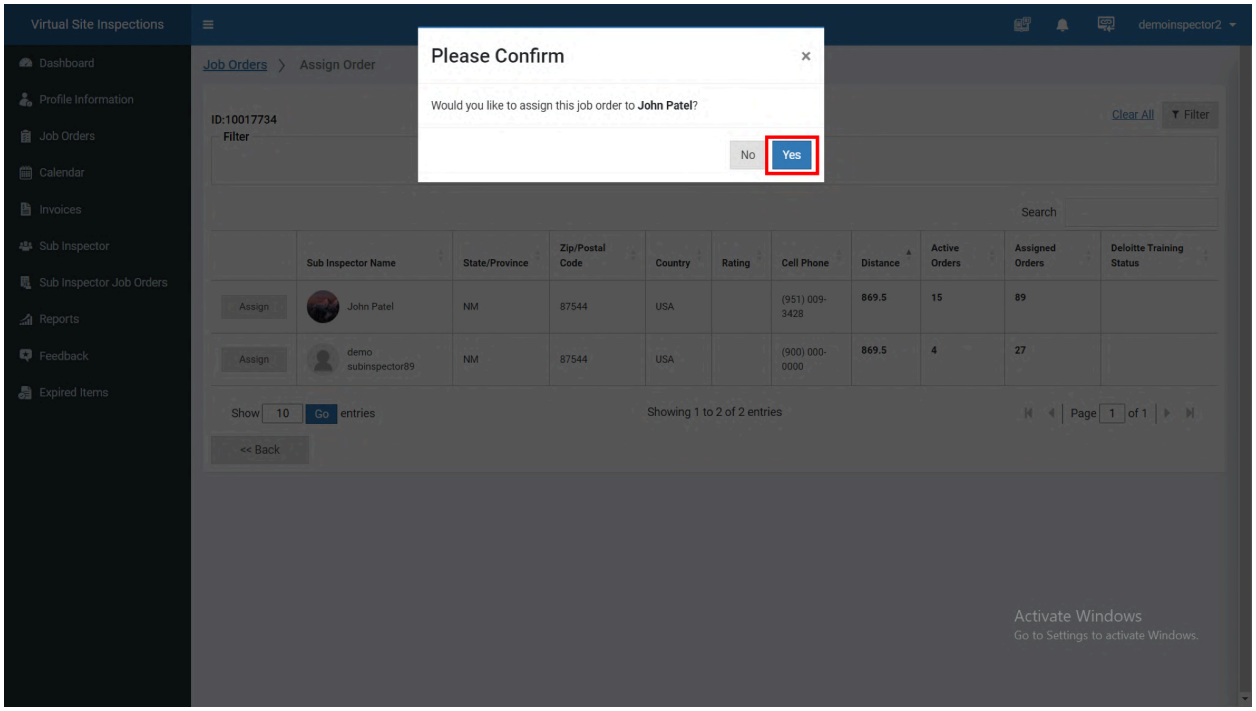


Clicking on the "Assign multiple job-sub inspector" icon will redirect users to the assign order screen. On this screen, a list of sub-inspectors is presented, allowing the inspector to assign the order to any specific sub-inspector of their choice.

Clicking on the "Assign" button will trigger a pop-up box for confirmation to assign the order to the sub-inspector, as highlighted in the screenshot below.



In the confirmation pop-up, there are two buttons, "Yes" and "No." Clicking on the "Yes" button will assign the order to the sub-inspector. On the other hand, clicking on the "No" button will not perform any action.

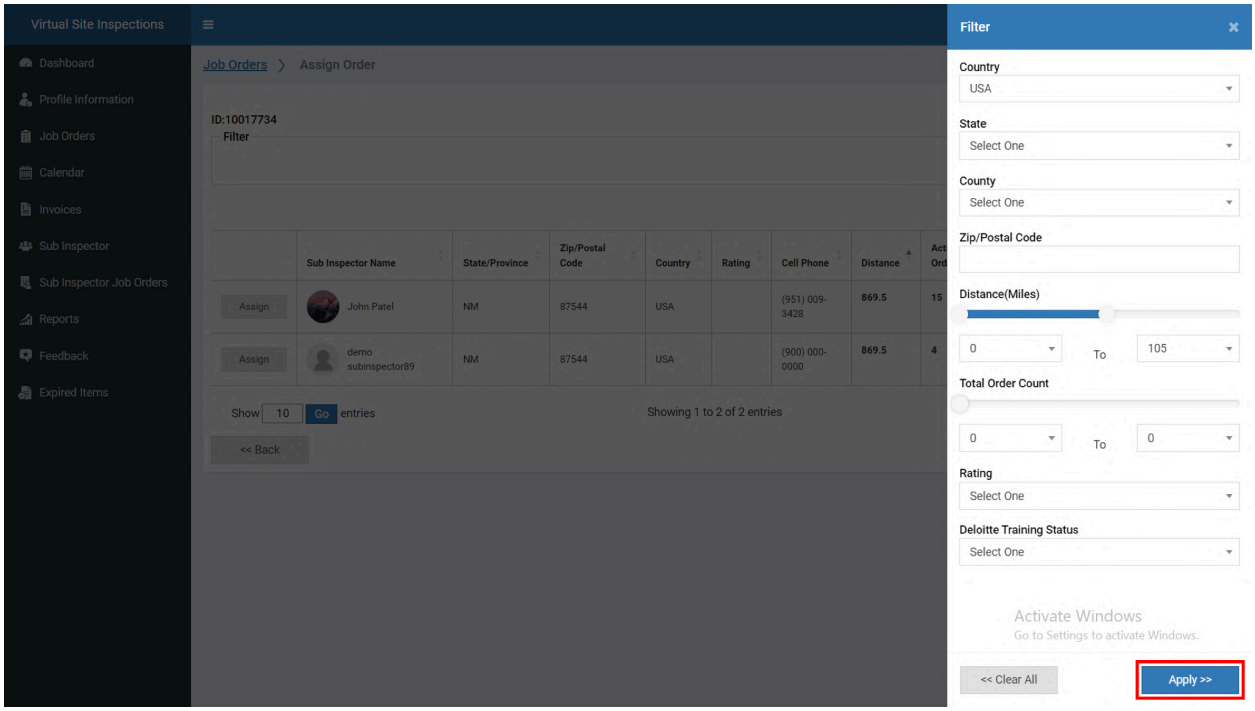


Filter - Assign Sub Inspector

The filters functionality comprises fields such as Country, State, County, Zip/Postal Code, City, Distance (Miles), Total Order Count, Rating, and Deloitte Training Status. Users have the option to select values from dropdown menus for Country, State, County, Zip/Postal Code, City, Total Order Count, Rating, and Deloitte Training Status.

For Total Order Count and Distance (Miles), users can utilize a range slider, specifying a specific range from the "To" to the "From". An interconnected feature is present, where selecting a country dynamically loads options for the state dropdown. Similarly, selecting a state loads options for counties, and choosing a county dynamically loads options for zip code or postal code based on the selected state. In the same manner, selecting a city dynamically loads options for zip code or postal code.

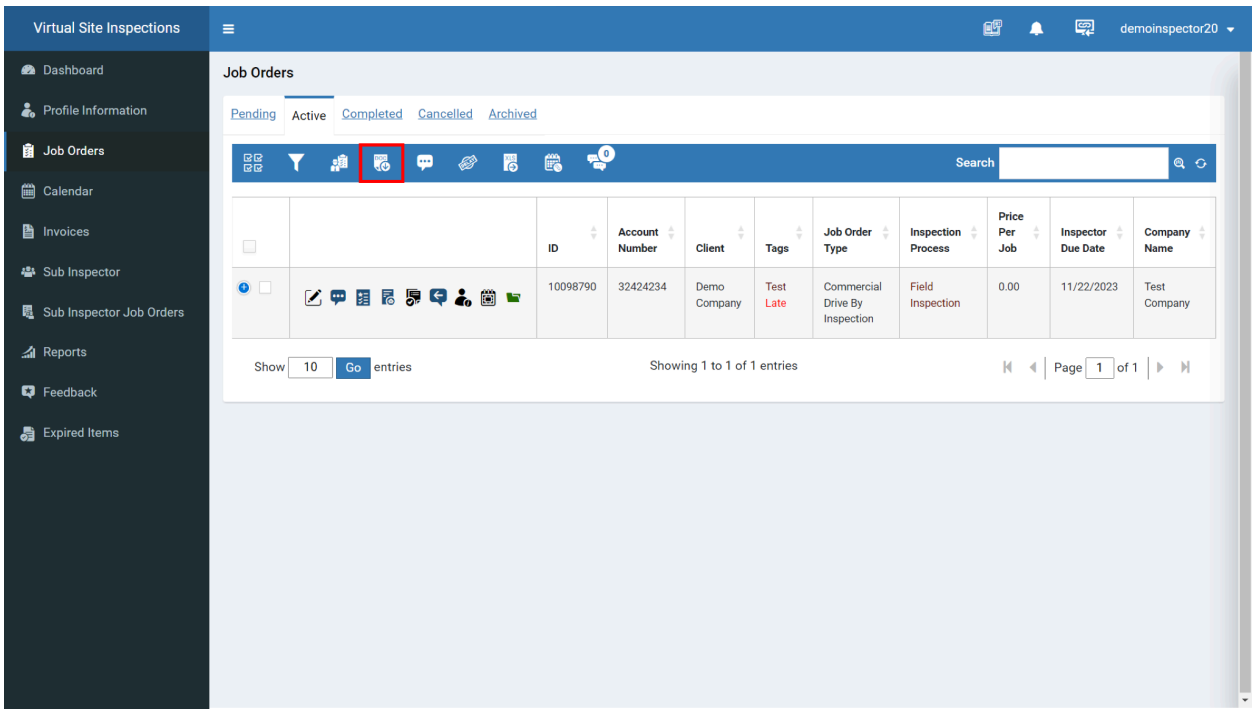
This interconnected filtering system enhances precision when selecting criteria in the Assign Sub Inspector Screen. After selecting values from the filters, users can click on the "Apply" button, triggering the retrieval and display of relevant Sub Inspector data in the list based on the specified filter criteria. Conversely, clicking the "Clear All" button will reset both the Sub Inspector list and the Filters fields, restoring them to their default states.



Download Document

The "Download Document" feature lets you download all documents for a chosen job order. Simply select the job order, click "Download Document," and a zip file will download to your

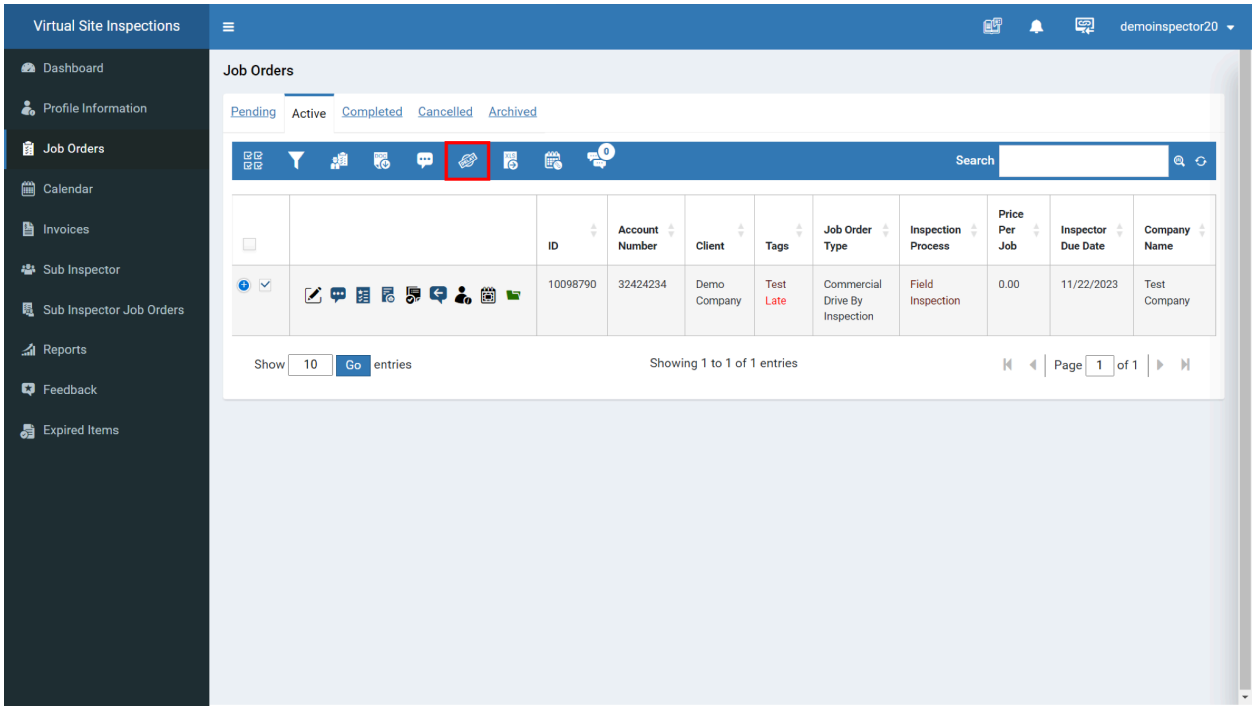
system. The files are neatly organized by job order ID. You also have the option to select and download documents for multiple job orders at once.



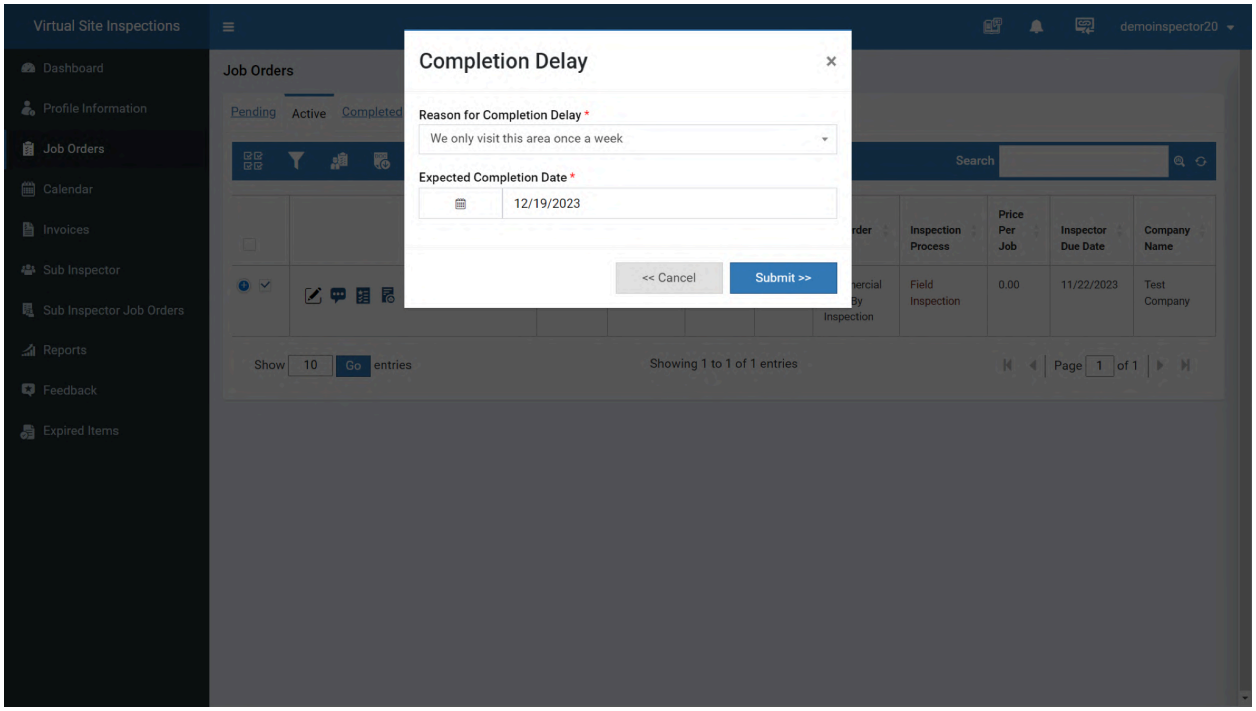
Mark As Delay

Inspectors can utilize this functionality to modify the completion date of an order.

To change the completion date of a selected job order, inspectors can click on the "Mark as Delay" icon.

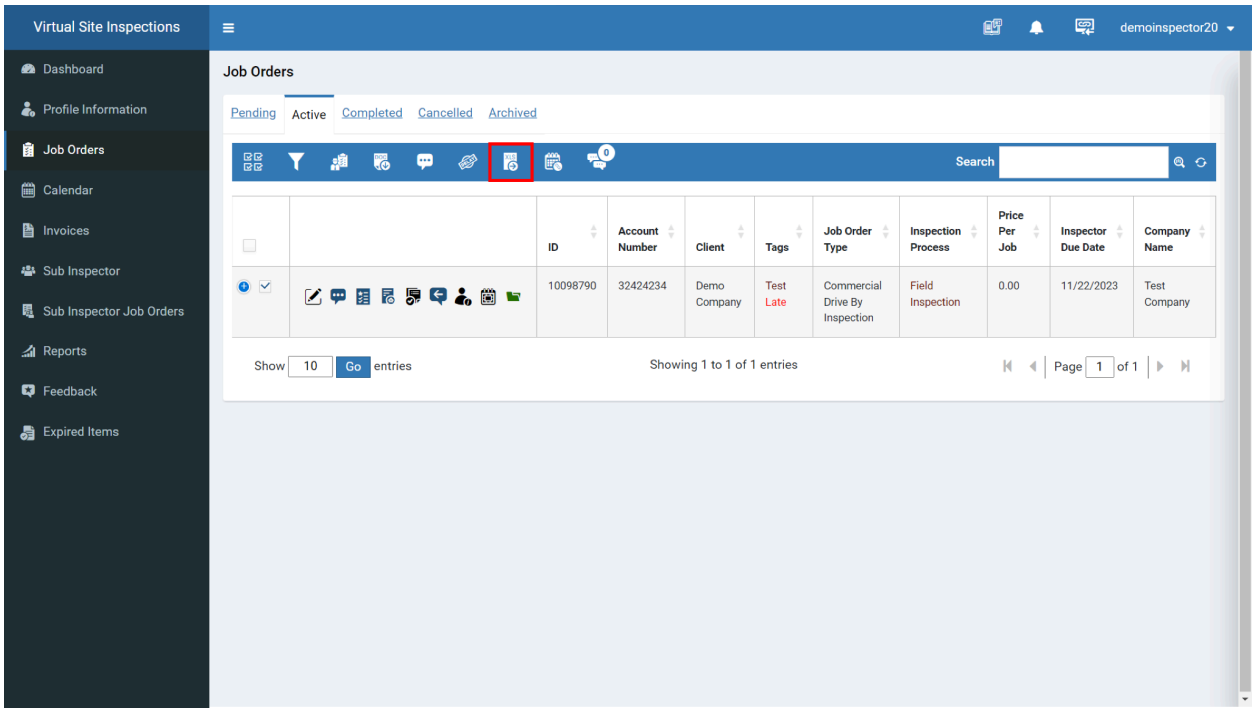


Clicking on the "Mark as Delay" icon will open a dialog box where inspectors can choose the reason for the completion delay and select the new date for the completed order. Upon selecting the necessary details, clicking the "Submit" button will update the completion date for that order.

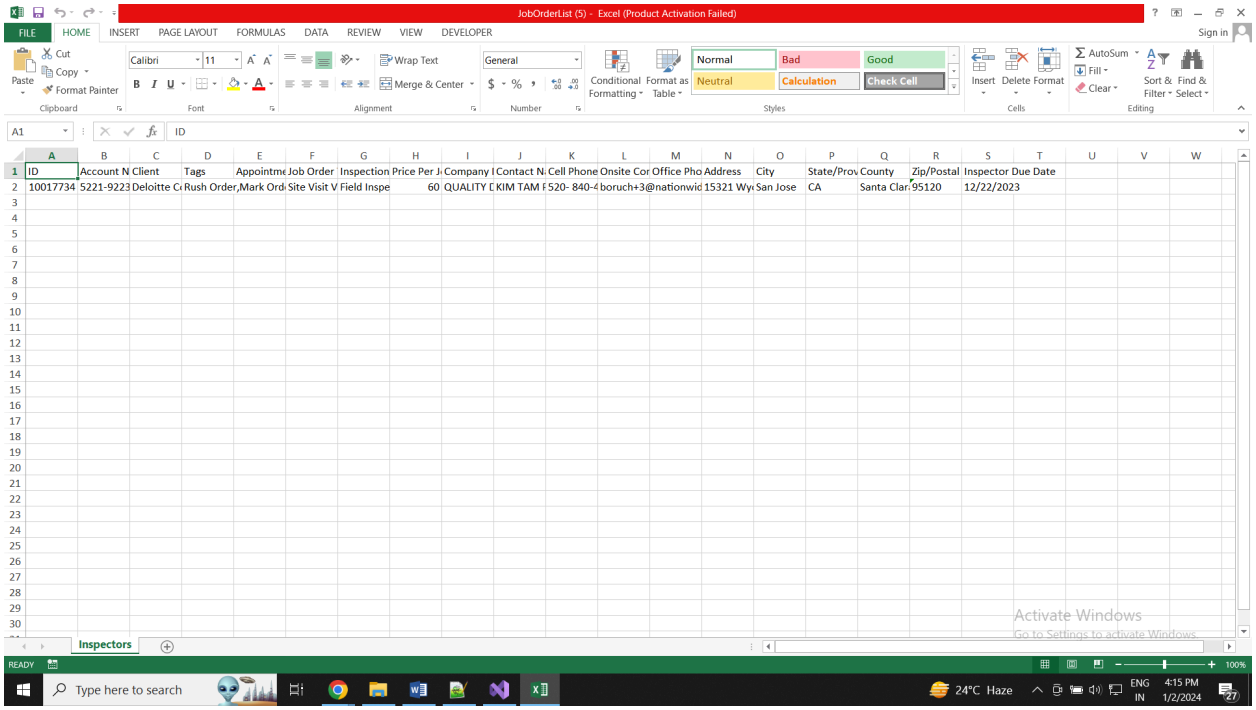


Export Job Orders

The "Export Job Orders" icon is utilized to download job order details in an XLS file format. It is mandatory to select at least one job order, and you also have the option to choose multiple job orders. If you wish to download the entire list, click on the "Select All" icon and then press the "Export Job Orders" icon. This action will generate an XLS file containing the information based on the selected job orders.



After clicking on the icon, it will download an XLS file to your system. You can preview the download in the screenshot below.

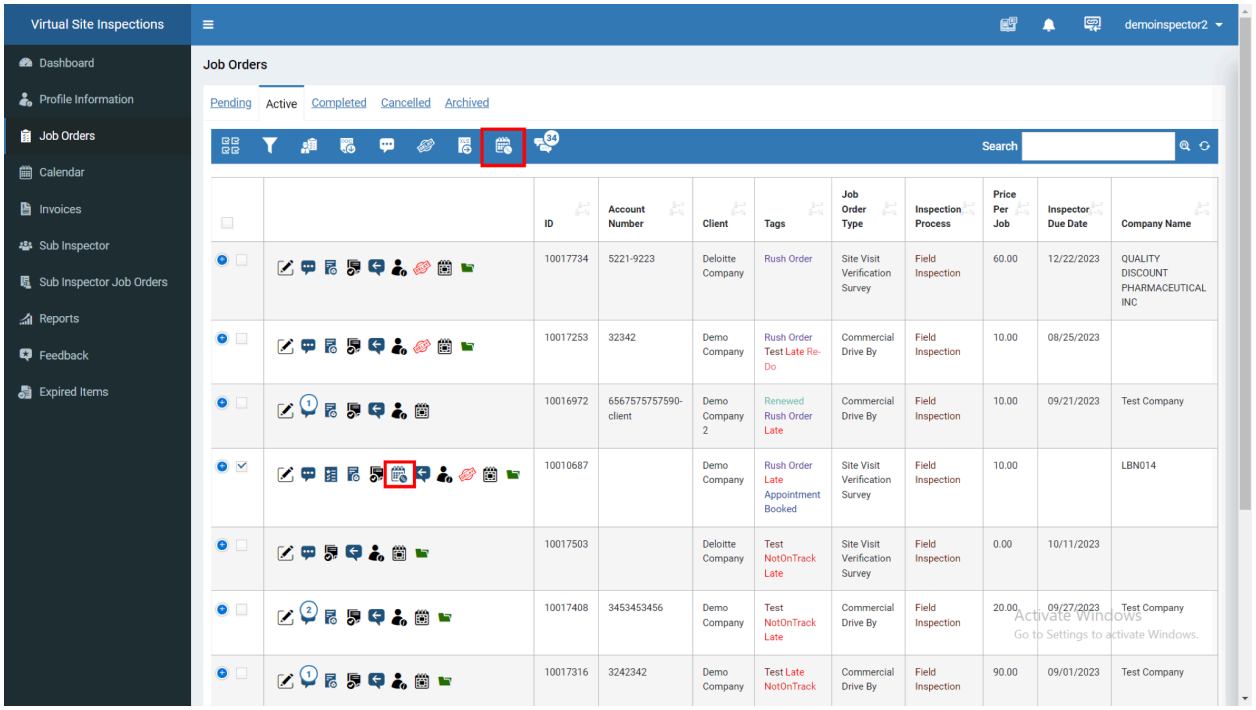


Book Appointment

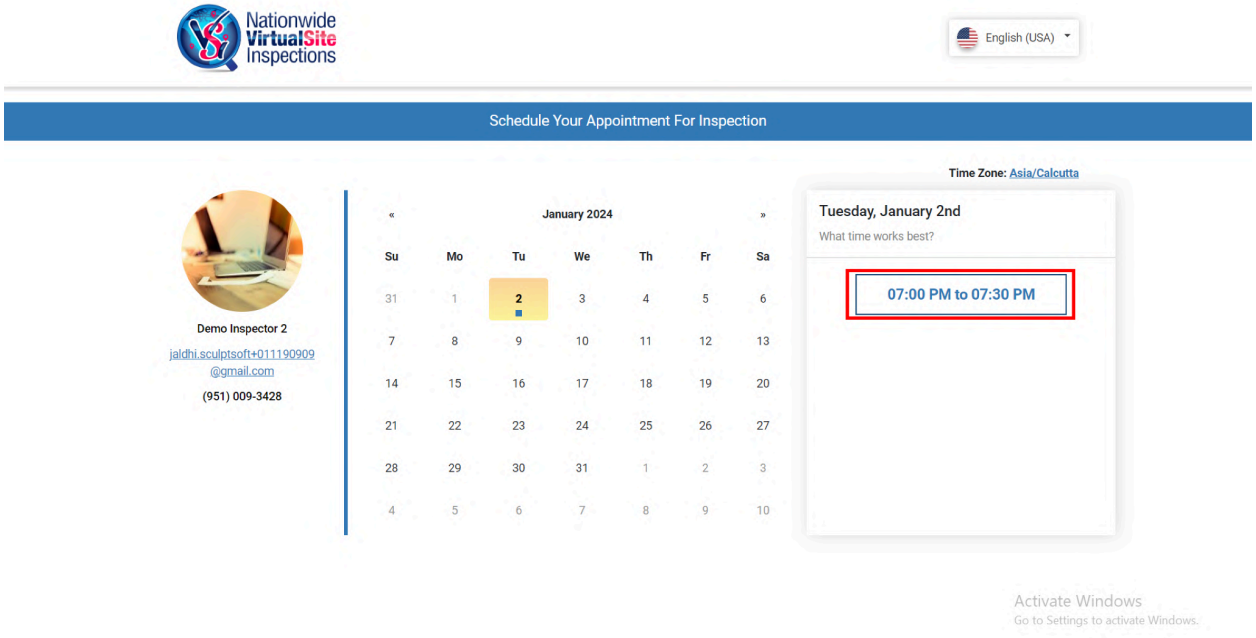
The "Book Appointment" functionality is utilized to schedule appointments with the onsite contact. It is booking the appointment date and time on behalf of the onsite contact.

To book an appointment, only select job orders containing the "Send Appointment Link" icon. You can choose only one job order at a time. After selecting the desired job order, click on the "Book Appointment" icon located in the blue header, as illustrated in the screenshot below.

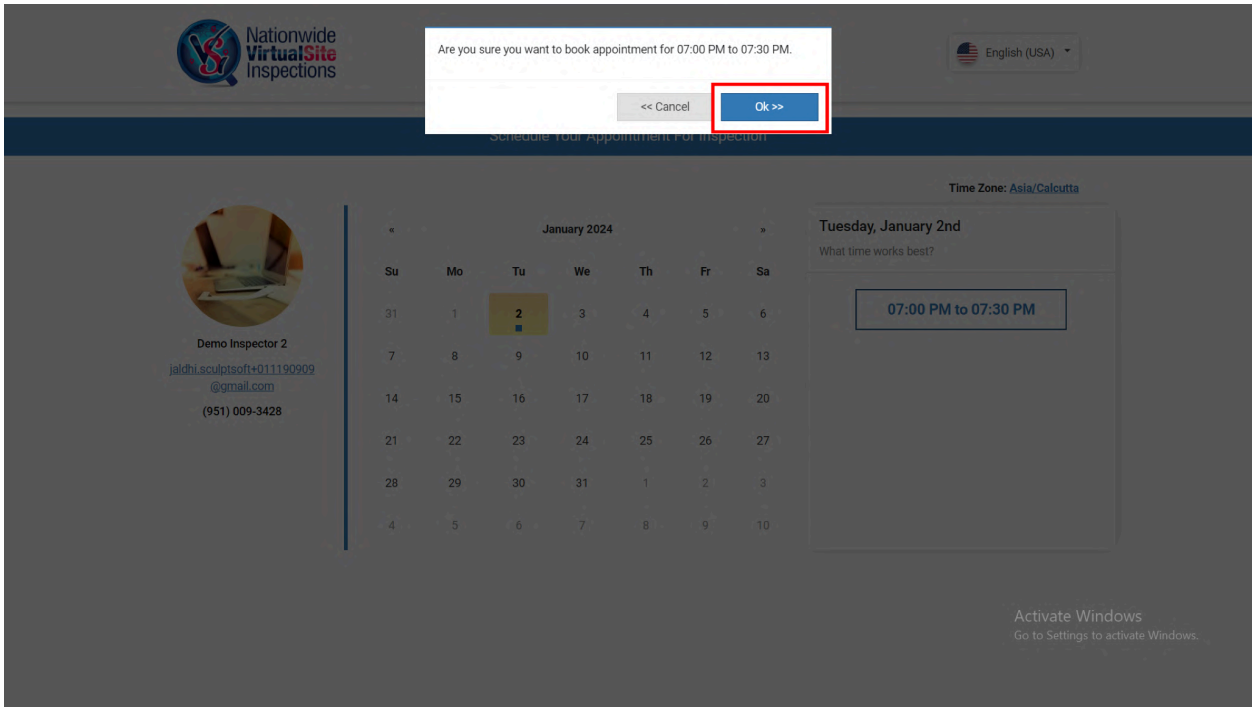
Note: To schedule an appointment for a specific date and time, the inspector needs to create a timeslot for that particular date in the calendar menu. Detailed information on calendar-related actions is covered later in the document, providing instructions on how to add a timeslot.



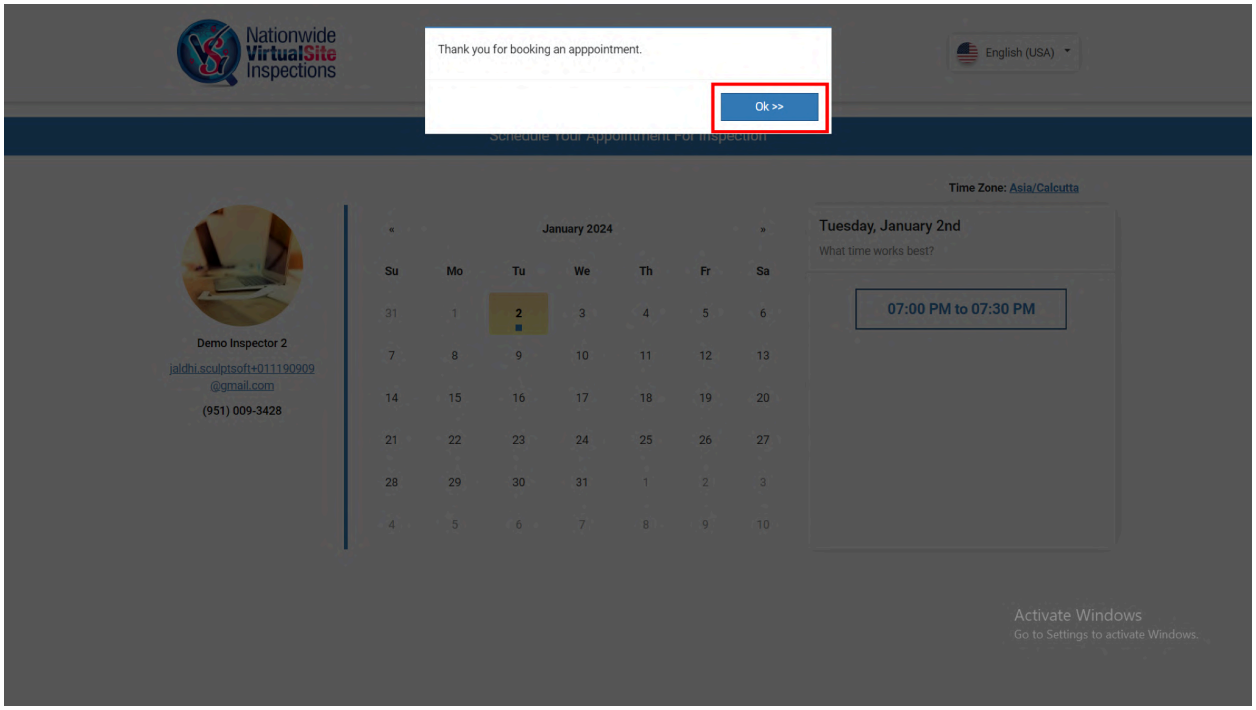
After clicking on the "Book Appointment" icon, the system will redirect you to the calendar page. On this page, you can view available slots listed. Choose the desired slot to book the appointment, as highlighted in the screenshot below.



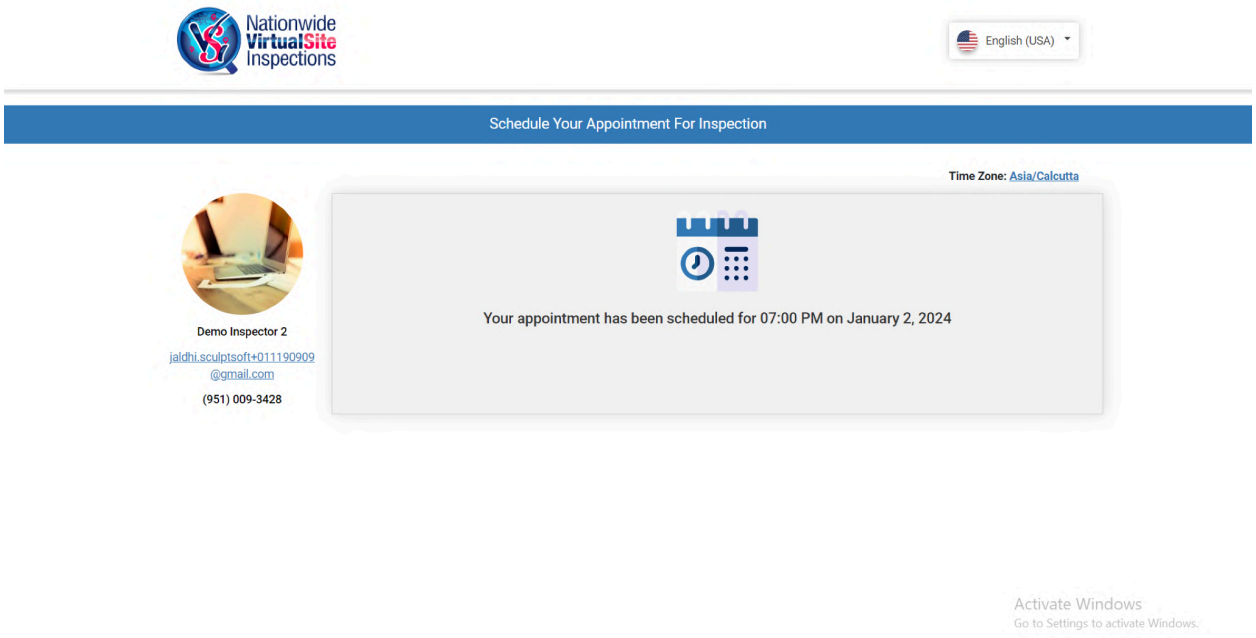
After clicking on the selected time slot, a dialog box will open to confirm the booking of the appointment. Clicking the "OK" button will proceed with the booking, while clicking the "Cancel" button will result in no action being performed.



After clicking the "OK" button, a "Thank You" dialog box will be displayed.



After clicking the "OK" button, the pop-up will be dismissed, and the system will redirect to the confirmation page.

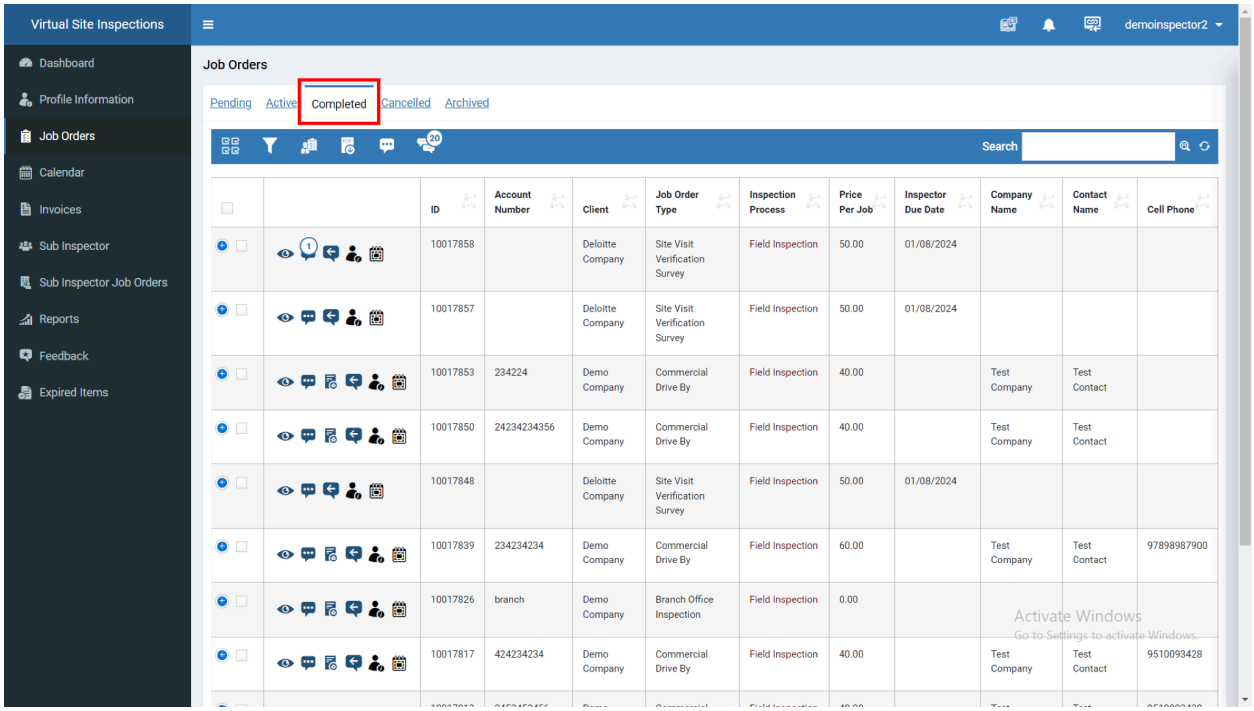


Completed Tab

When you select the 'Completed' status, it shows job orders that have been completed.

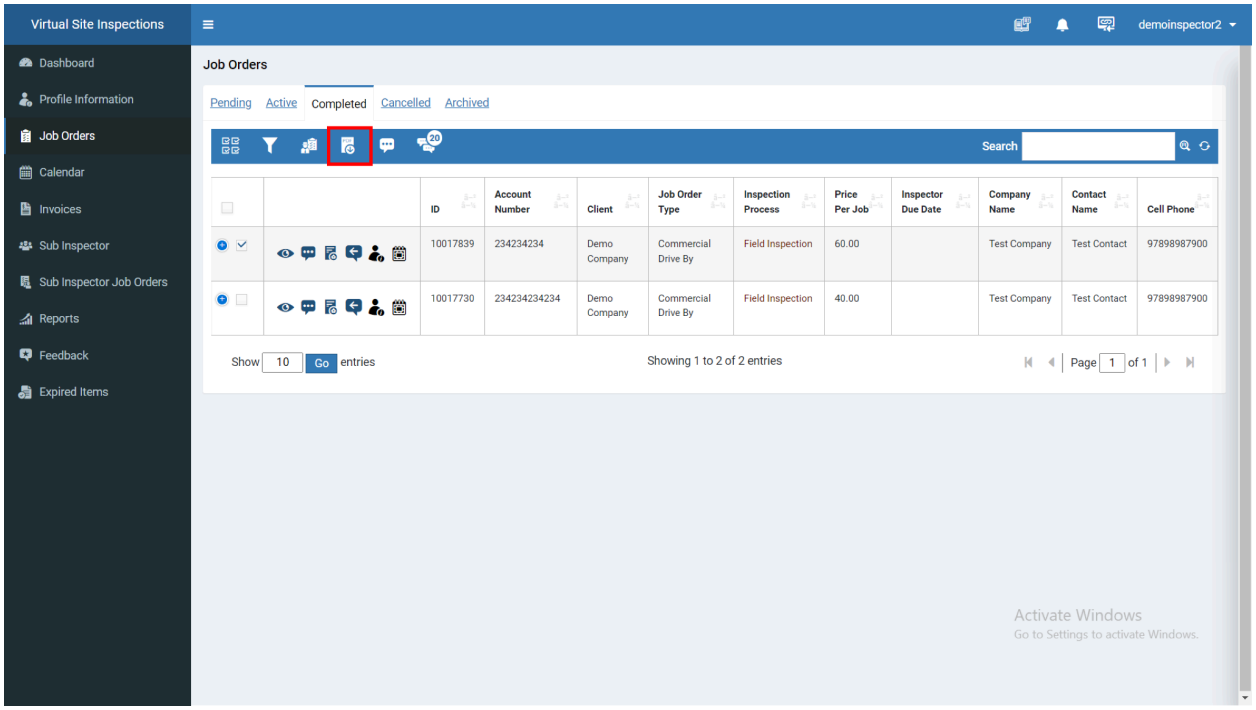
When selecting the "Completed" status in the blue header bar, it offers options such as "Select All", "Filter", "Download Selected PDF Reports", "Message" and "Message Count."

In the "Completed" tab, you can perform the same actions as explained above for the "Active" tab with regard to the fields: "Select All", "Filter", "Assign Multiple Jobs - Sub Inspector", "Message" and "Message Count."

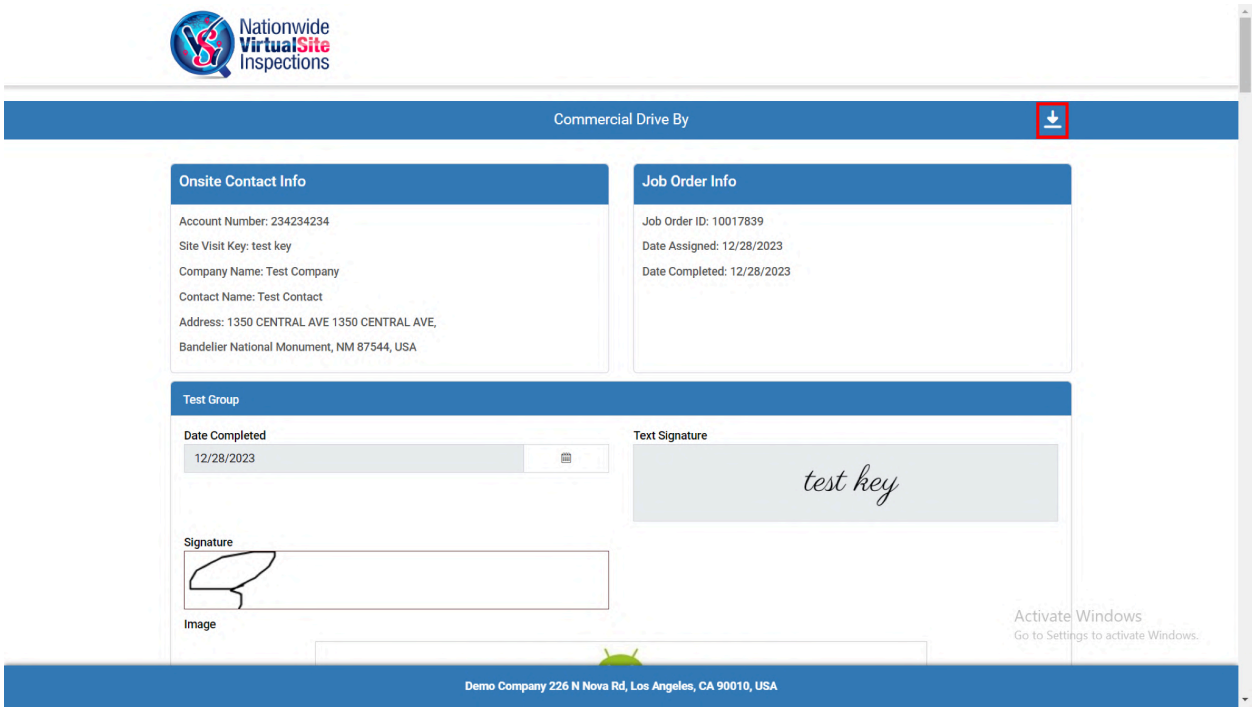


Download Selected PDF Reports

The "Download Selected PDF Reports" function is utilized to generate reports for job orders. If multiple job orders are selected and the "Download Selected PDF Report" icon is clicked, it generates reports for all selected job orders and sends them to the client's email.



However, if only one job order is selected and the icon is clicked, the report opens in a new tab, allowing you to view and download it directly from that tab.To download PDF report click on the ‘Download’ icon highlighted in below screenshot.

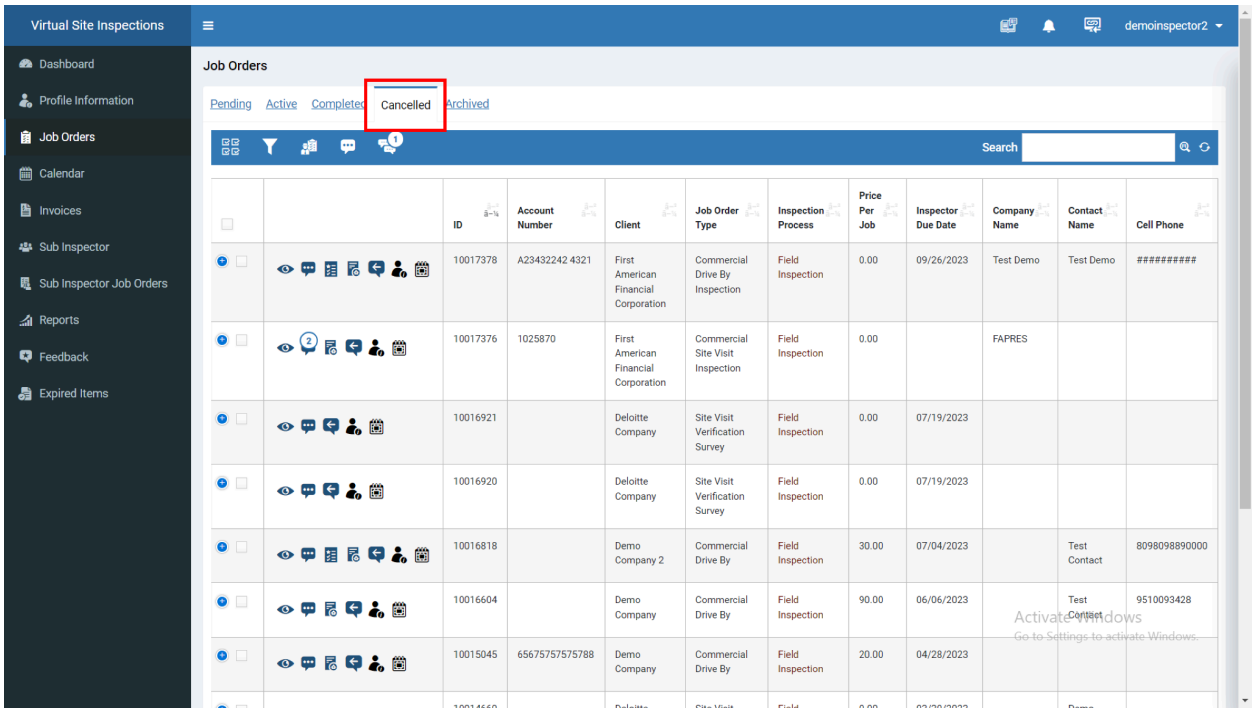


Cancelled Tab

When you choose the "**Cancelled**" status, it shows job orders that have been canceled Approved by the administrator.

When selecting the "Cancelled" status in the blue header bar, it presents options such as "Select All", "Filter", "Message" and "Message Count."

In the "Cancelled" tab, you can execute the same actions as described for the "Active" tab concerning the fields: "Select All", "Filter", "Assign Multiple Job-Sub Inspector", "Message" and "Message Count."

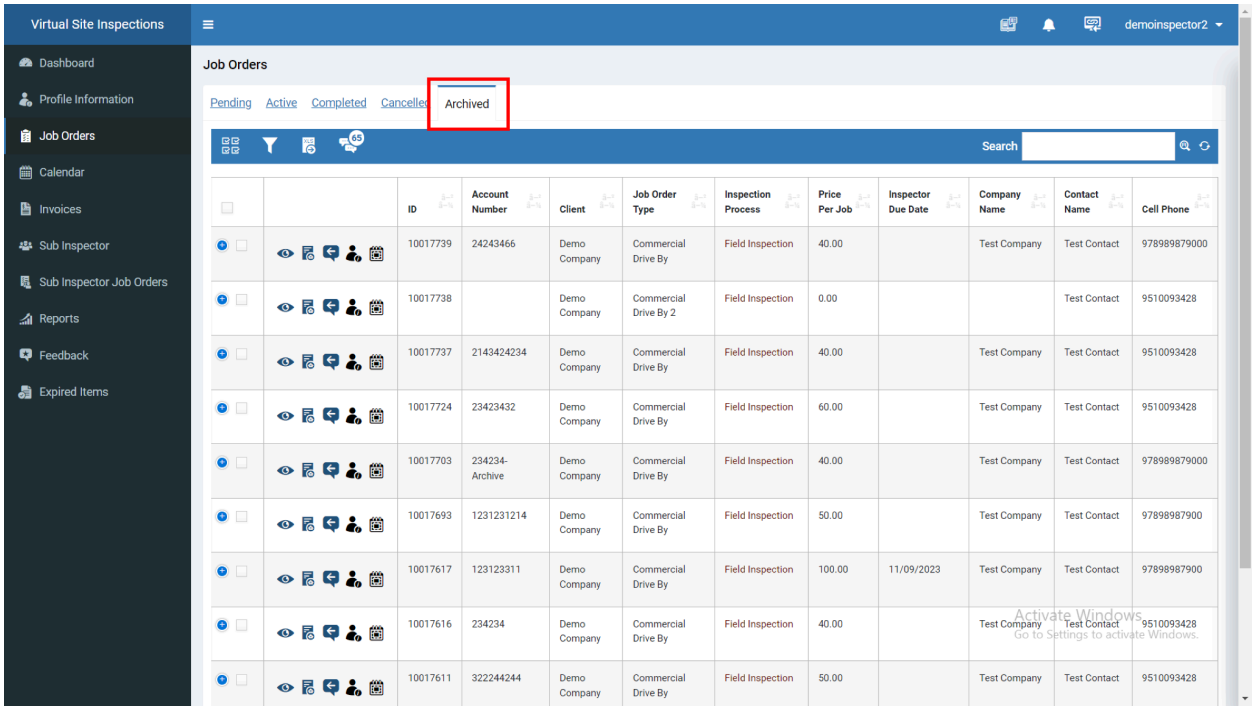


Archived Tab

When you choose the "**Archived**" status, it shows all job orders that have been archived by the administrator.

When we select the "Archived" status in the blue header bar, it provides options such as "Select All", "Filter", "Export Job Orders" and "Message Count".

In the "Archived" tab, you can perform the same actions as explained above for the Active tab for the fields: "Select All", "Filter", "Export Job Orders" and "Message Count".

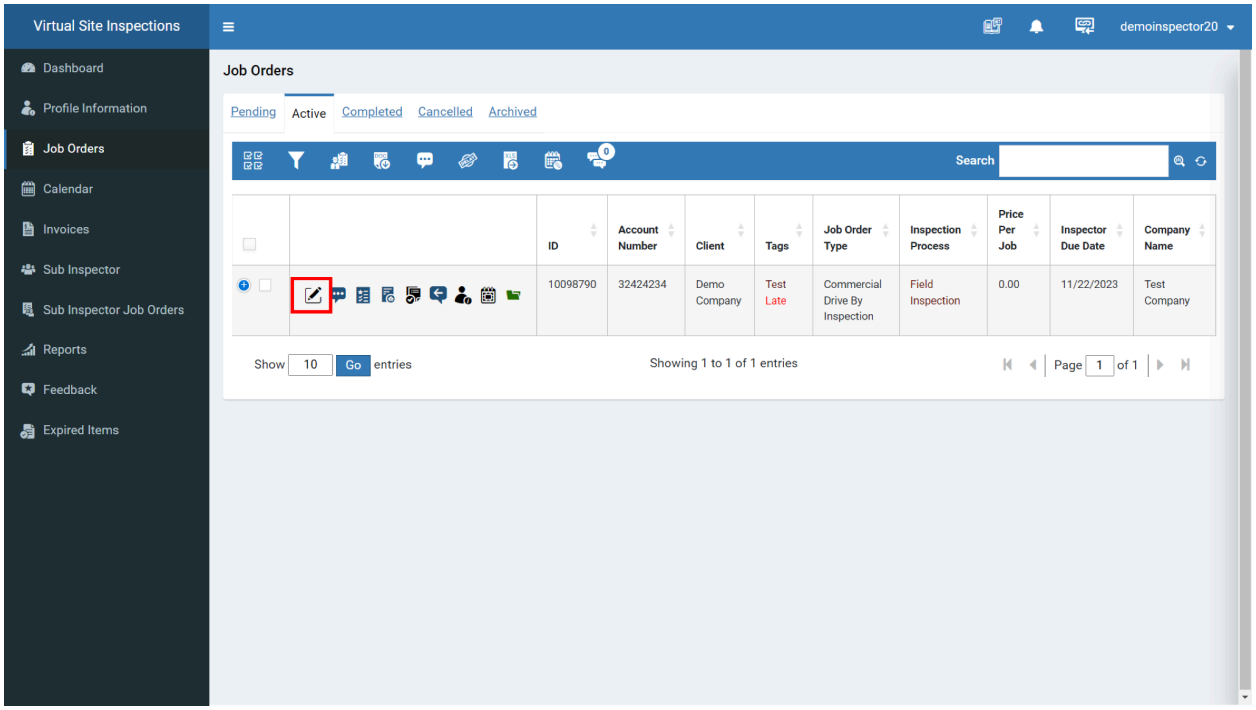


Job Orders Actions

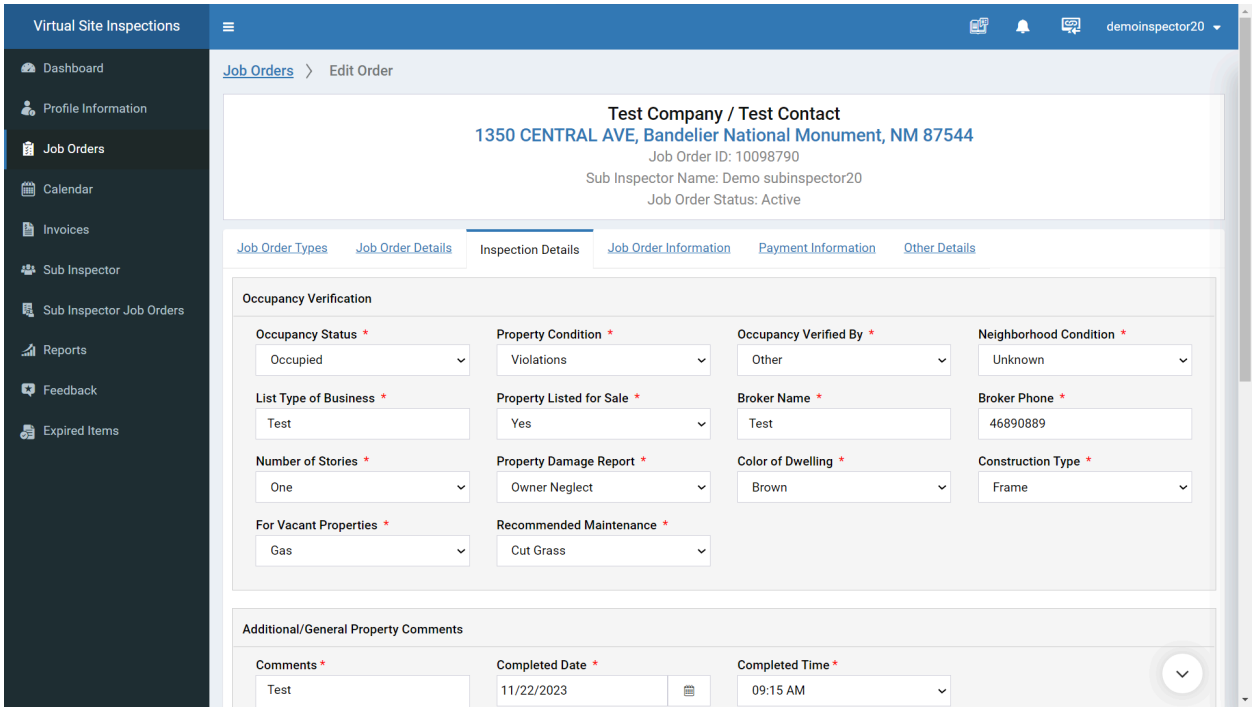
In a job order listing, you will find several icons in the first column, such as Edit Job Order, Messages, Link Share, Property Details, Assign Sub Inspector, Send Video Call Link (If the order requires an appointment), Send Back Reason, Assign User Info, Appointment Date & Time, and Document Available for Download. You can use these icons to perform various actions.

Edit Job Order

The edit icon is utilized to modify the details of a job order.



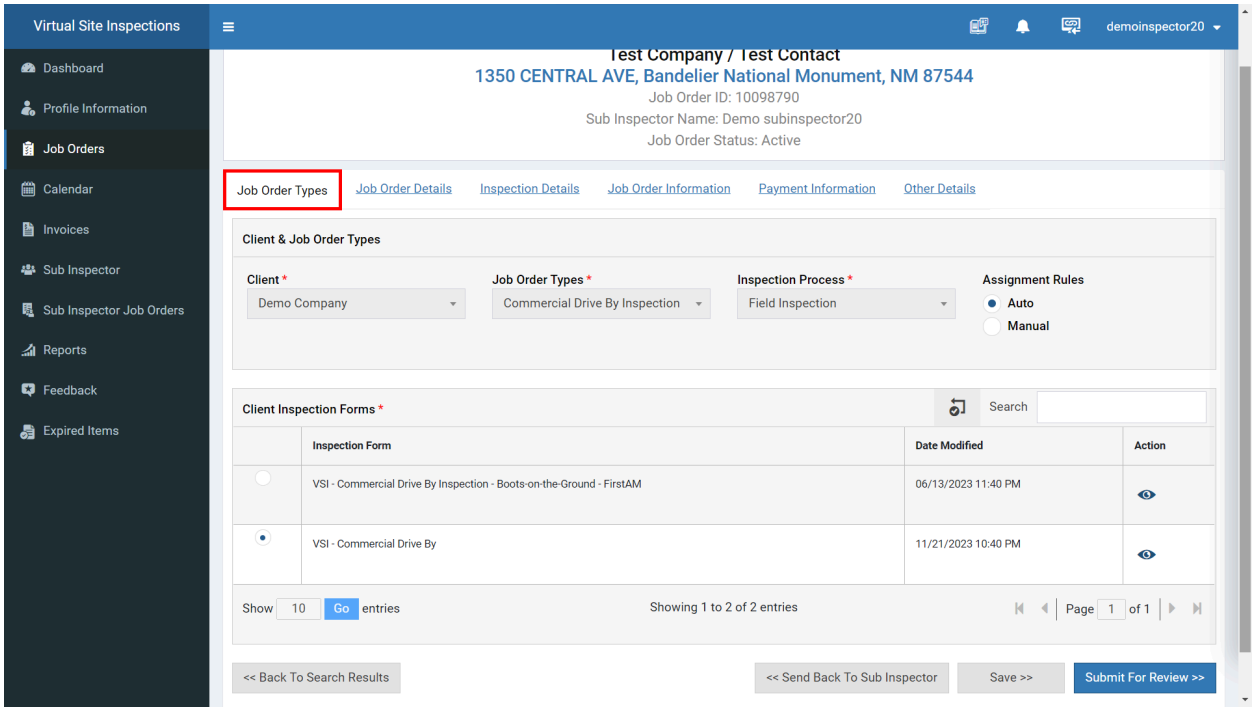
After clicking on the 'Edit' button, you will be directed to a new page where you can access five different sections: job order type, job order details, inspection details, job order information, payment information, and other details.



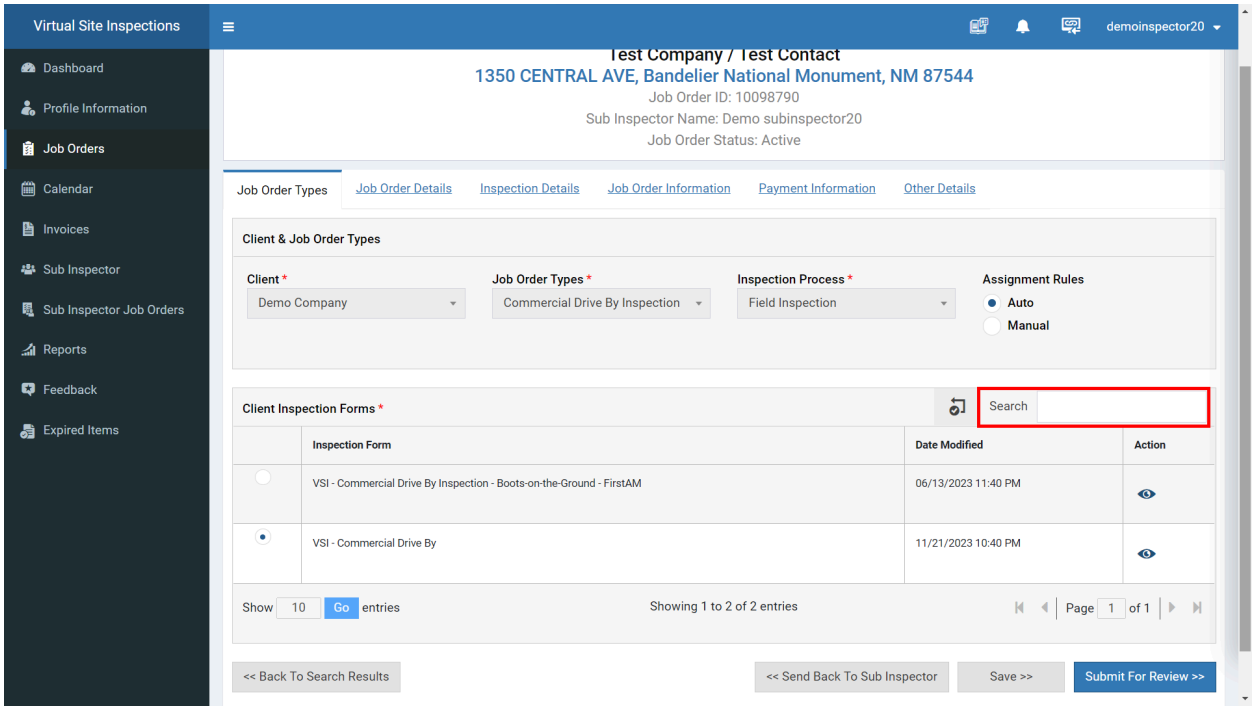
In the 'Job Order Type' section, there are two subsections: 'Client Job Order Types' and 'Client Inspection Forms.

In the 'Client Job Order Type' section, you will find several fields such as 'Client' which indicates the client's name for the job order, 'Job Order Type' representing the type of job order, 'Inspection Process' indicating the type of process, and 'Assignment Rules.'

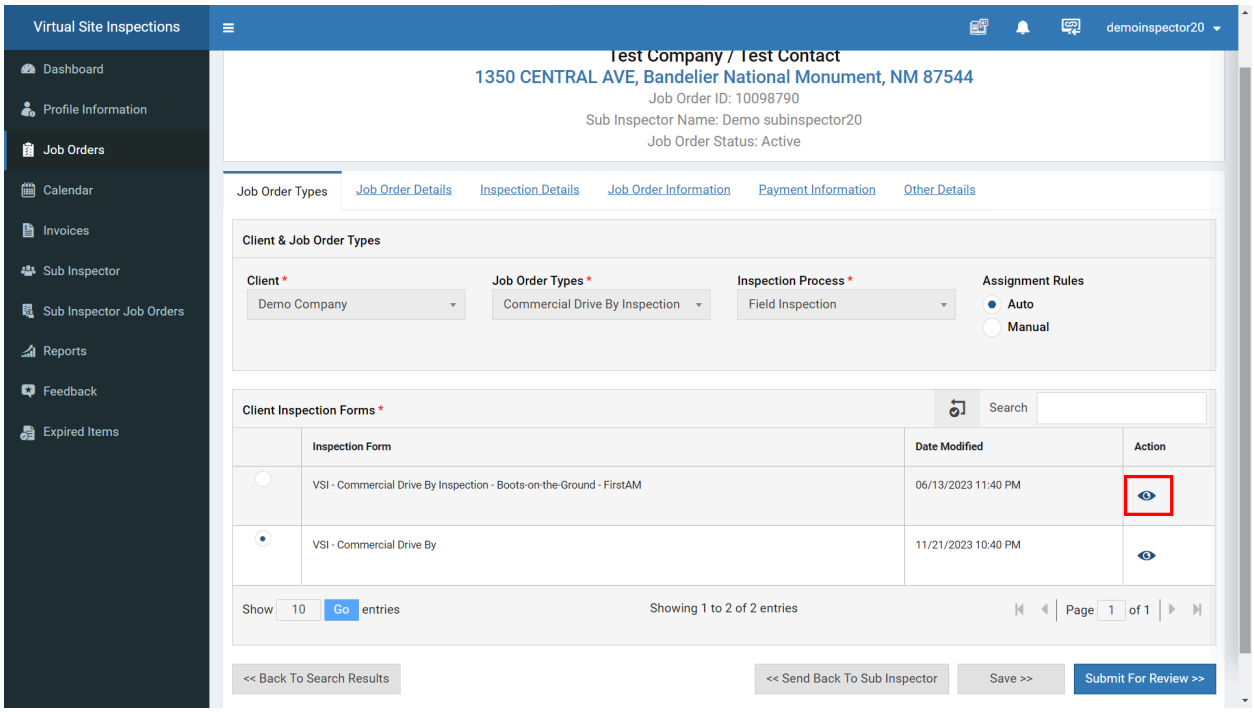
In the 'Client Inspection Form' section, you will find all the inspection forms mapped with the selected job order and client. In the first column, there are markers indicating the selected inspection forms. Following that, the second column displays the names of the inspection forms. Afterward, you will find the date of the latest modification for each inspection form. Action buttons are also provided, allowing you to view each inspection form.

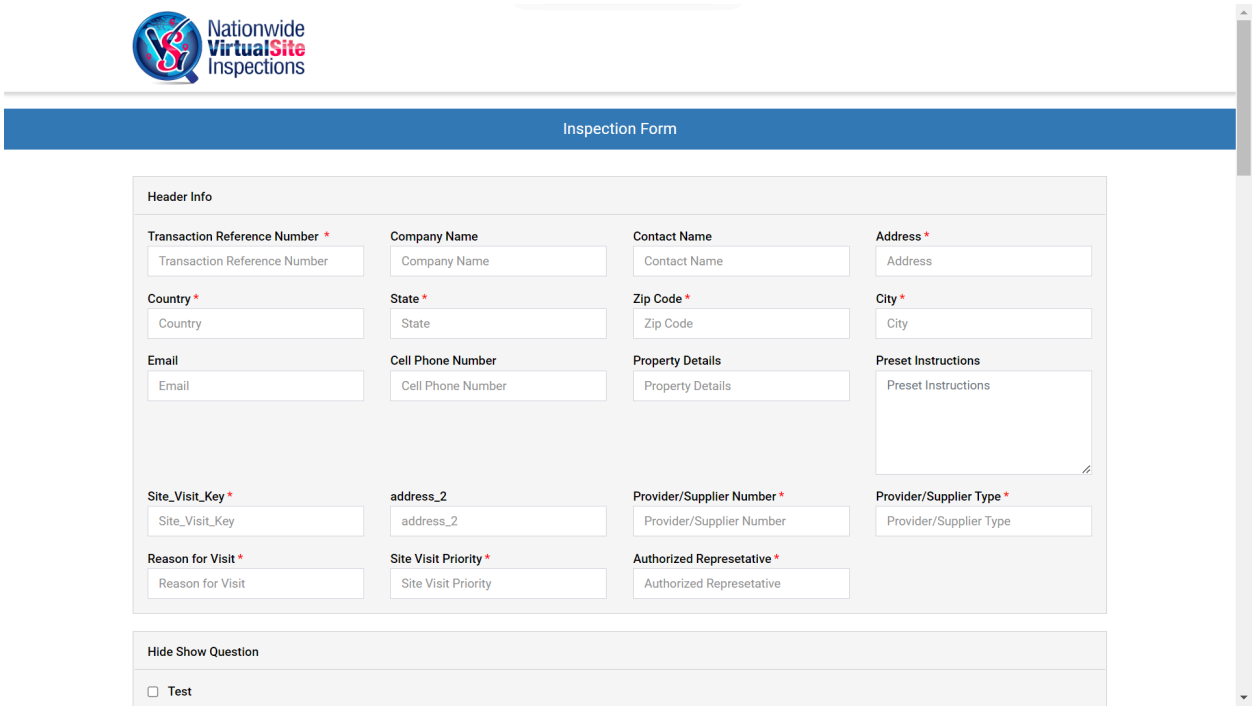


To search for an inspection form using a keyword, the system performs the search in the 'Name' field. Enter your search term in the highlighted search field, as illustrated in the provided screenshots, and press enter or click on the finder icon next to the text field. The system will then search for matching words within the inspection form names and display the relevant inspection form records.



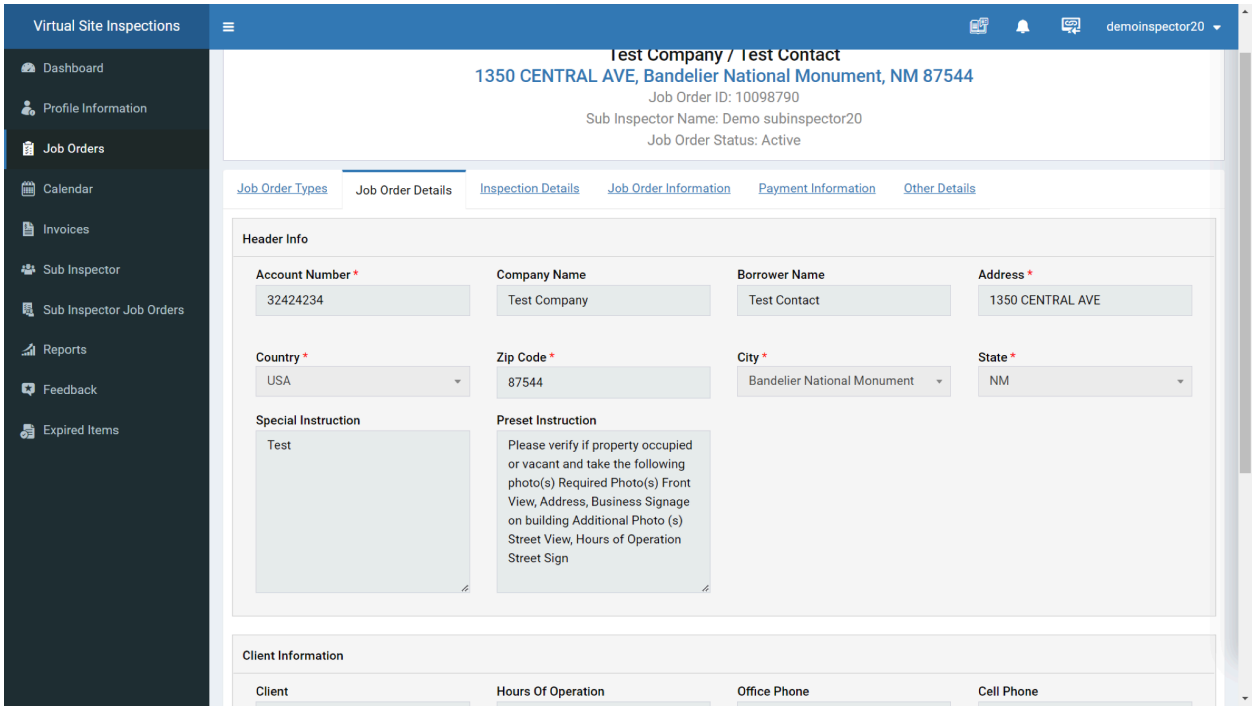
To view an inspection form, click on the 'View' button in the inspection form list. This will open a new tab where you can preview the form, including all groups, image section, and document section.





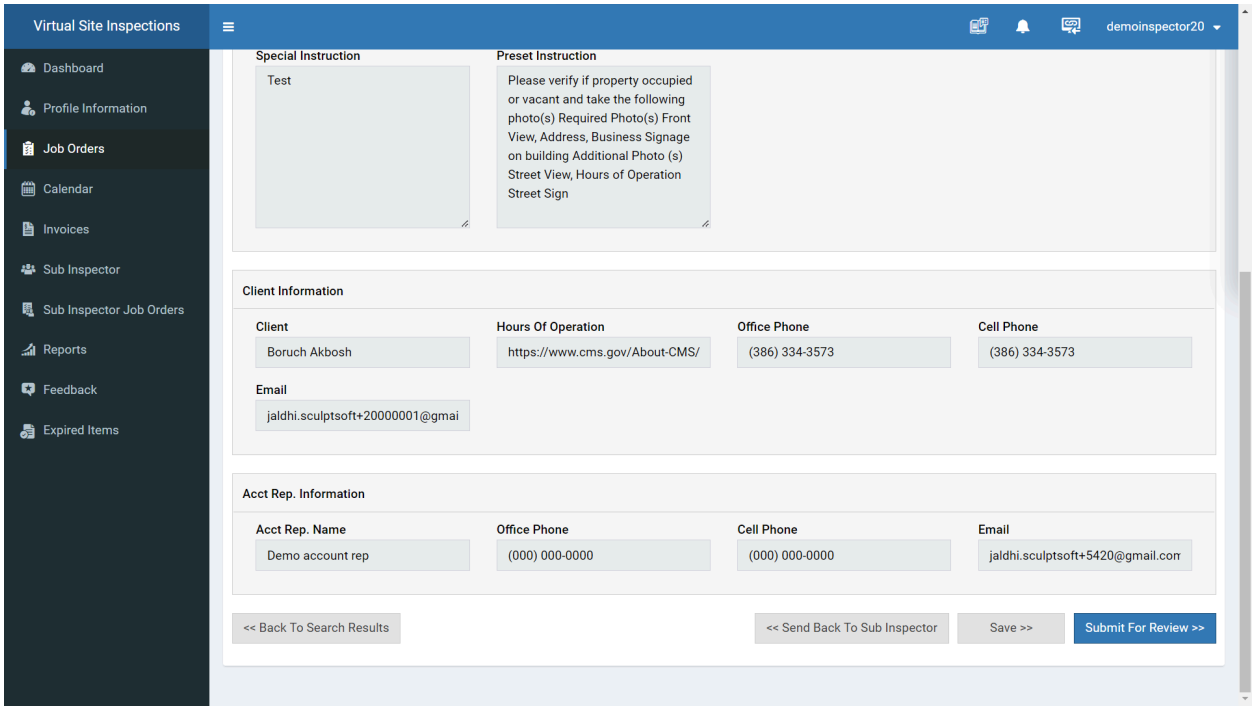
In the 'Job Order Details' section, you will find three subsections: Header Info, Client Information, and Acct Rep. Information.

In the 'Header Info' section, you will find job order-related fields such as account number, company name, contact name, address of the property, and additional fields that have been added to the inspection form.



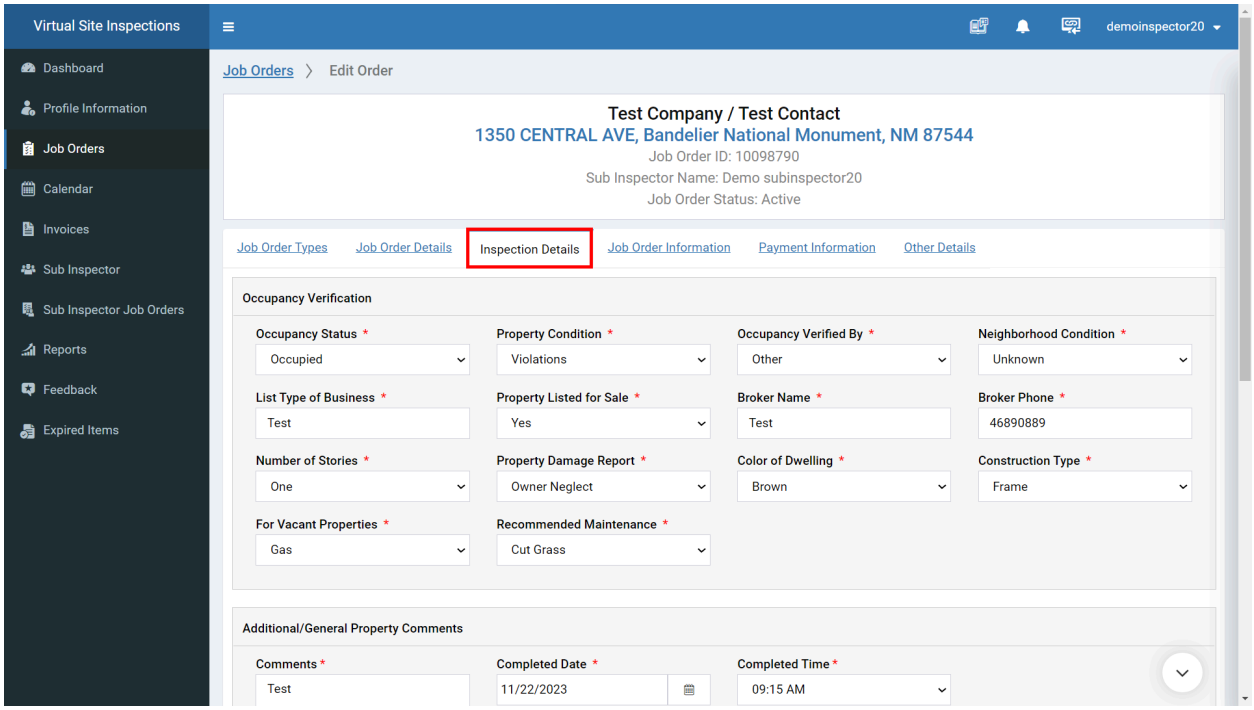
In the 'Client Information' section, you will find details related to the client. This includes the client's name, hours of operation, as well as the client's contact cell phone number and email.

After that, in the 'Acct Rep. Information' section, you will see details related to the account representative. This includes the account rep. name, office phone number, cell phone number, and email address of the account representative.

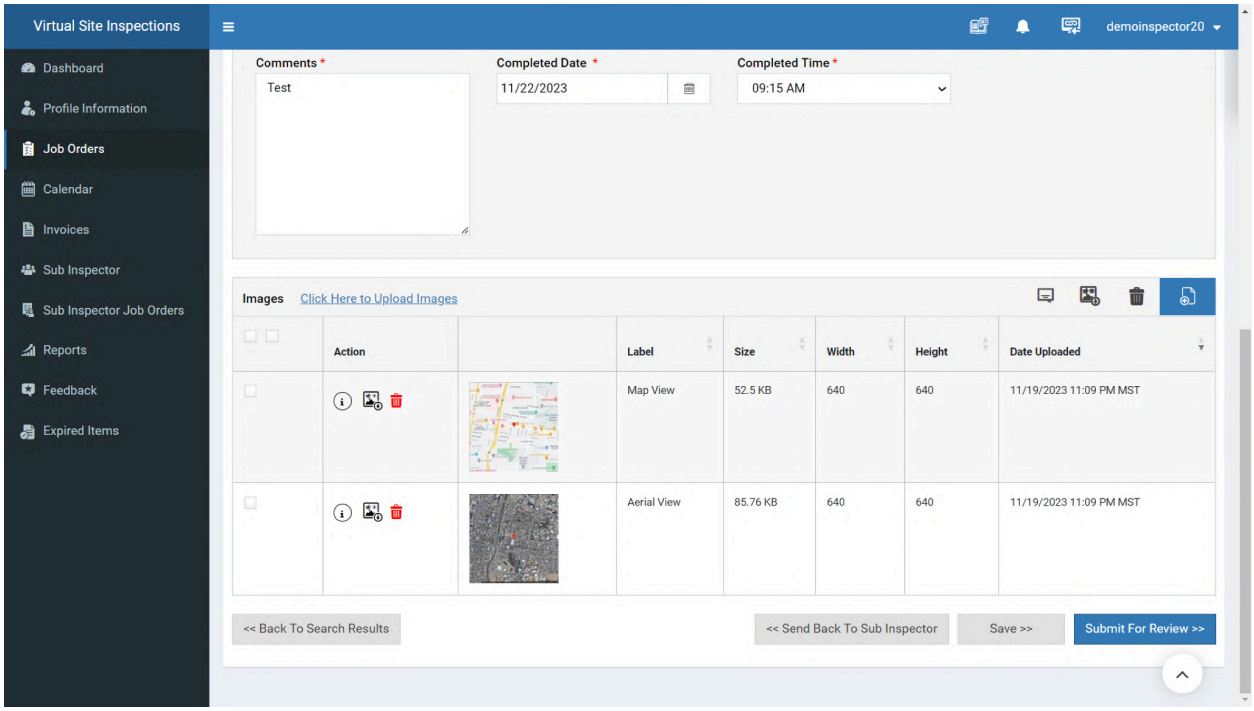


In the 'Inspection Details' section, you will find a list of inspection form groups, followed by the Images and Documents sections.

In the 'Inspection Details' section, you will find a comprehensive list of inspection form groups. Within each group, you will see the questions related to the job order. Here, you can review and update the existing field question’s answers.

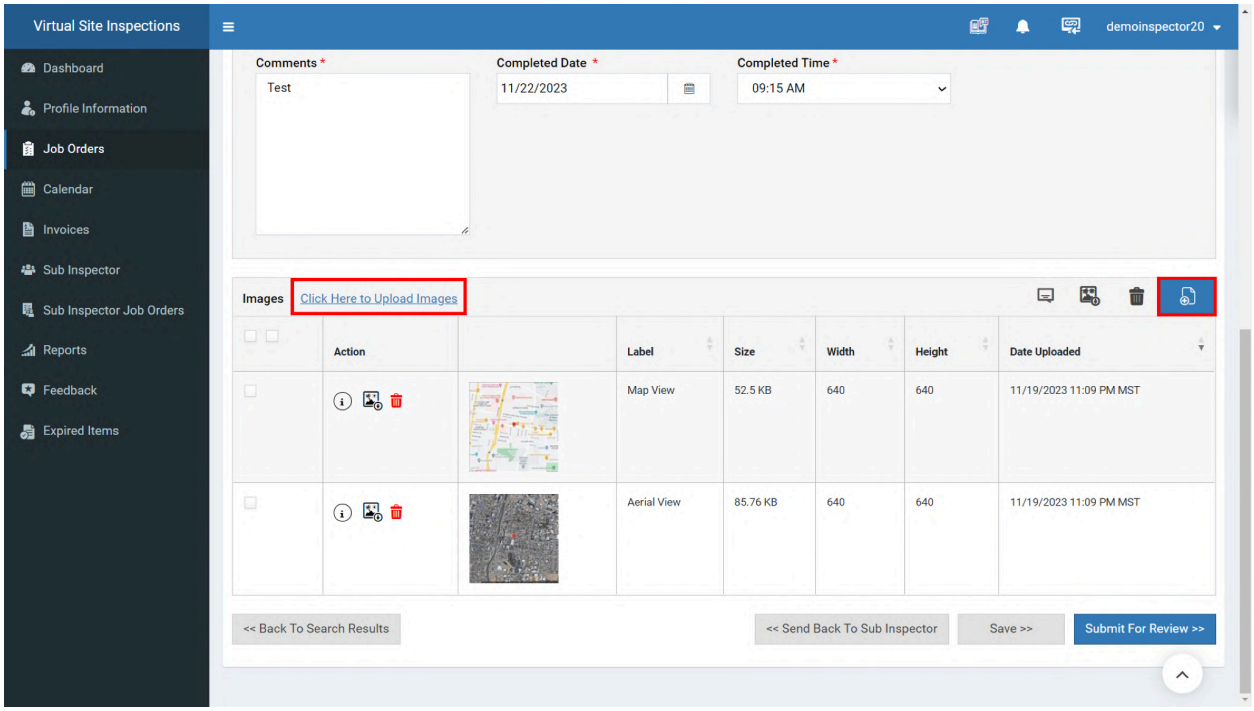


In the image section, you will find all the uploaded and predefined images that are mapped in the inspection form, along with their respective labels, sizes, widths, heights, and the date of upload.

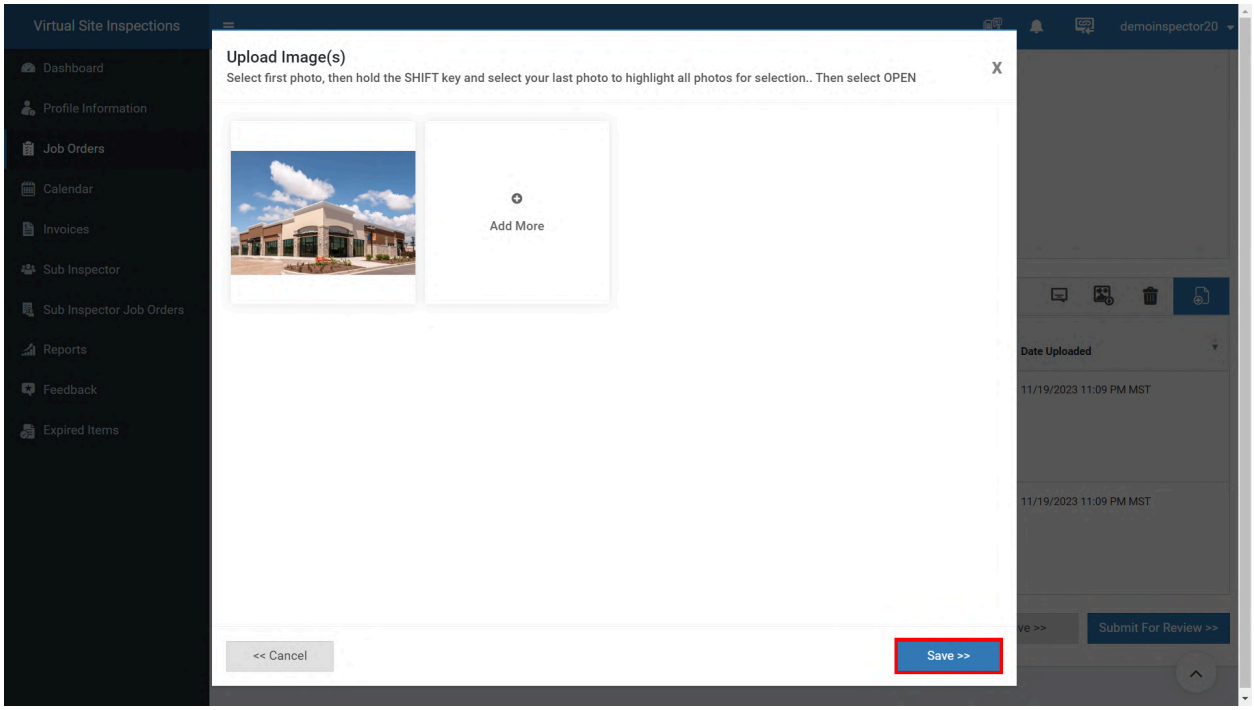


In the 'Image' section, you will find various options at the top of the image bar, including 'Add Label', 'Download Selected Images', 'Delete Selected Images' and 'Add New'.

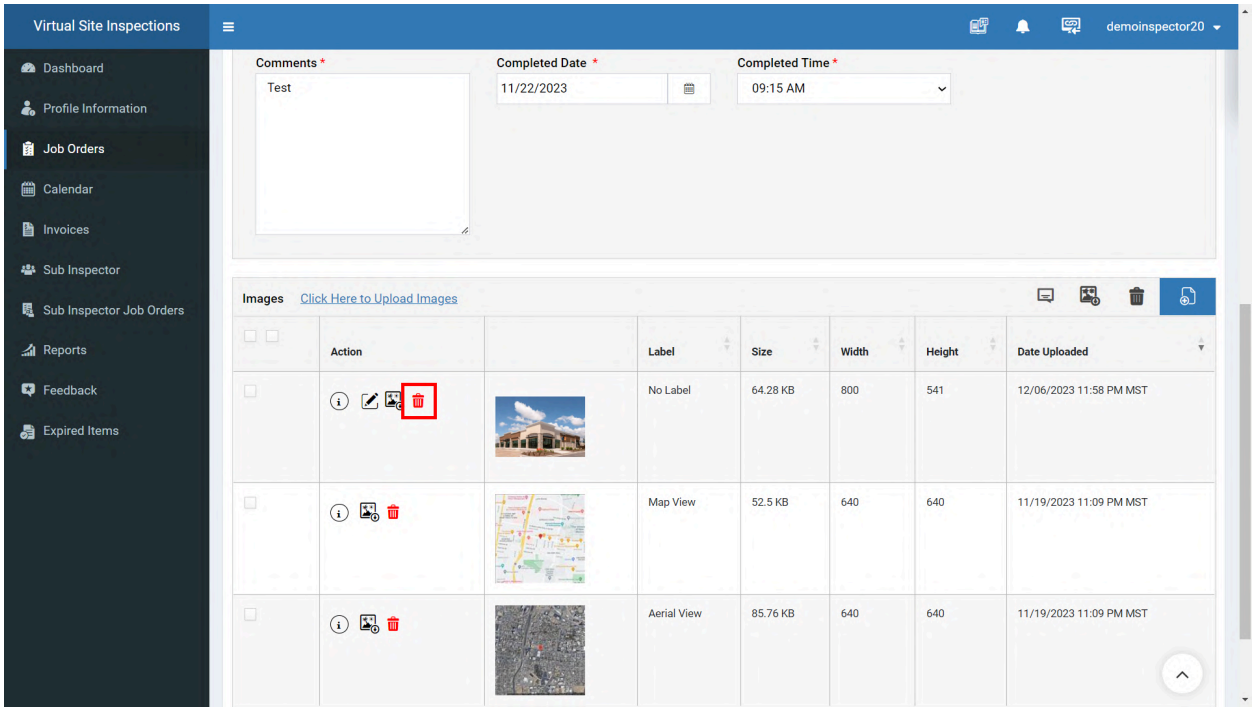
On clicking the 'Add New' or 'Click Here to Upload Images' button, a system dialog will open, allowing you to choose your file for upload.



In the dialog, select the image and click the 'Open' button in the system file selection dialog. This action will close the current dialog, and subsequently, another dialog will appear, showcasing the selected files. Below, you will find the 'Save' button. Clicking on the 'Save' button will temporarily store the images. To ensure permanent storage along with the job order, it is necessary to click on the 'Save' button located at the bottom of the form.

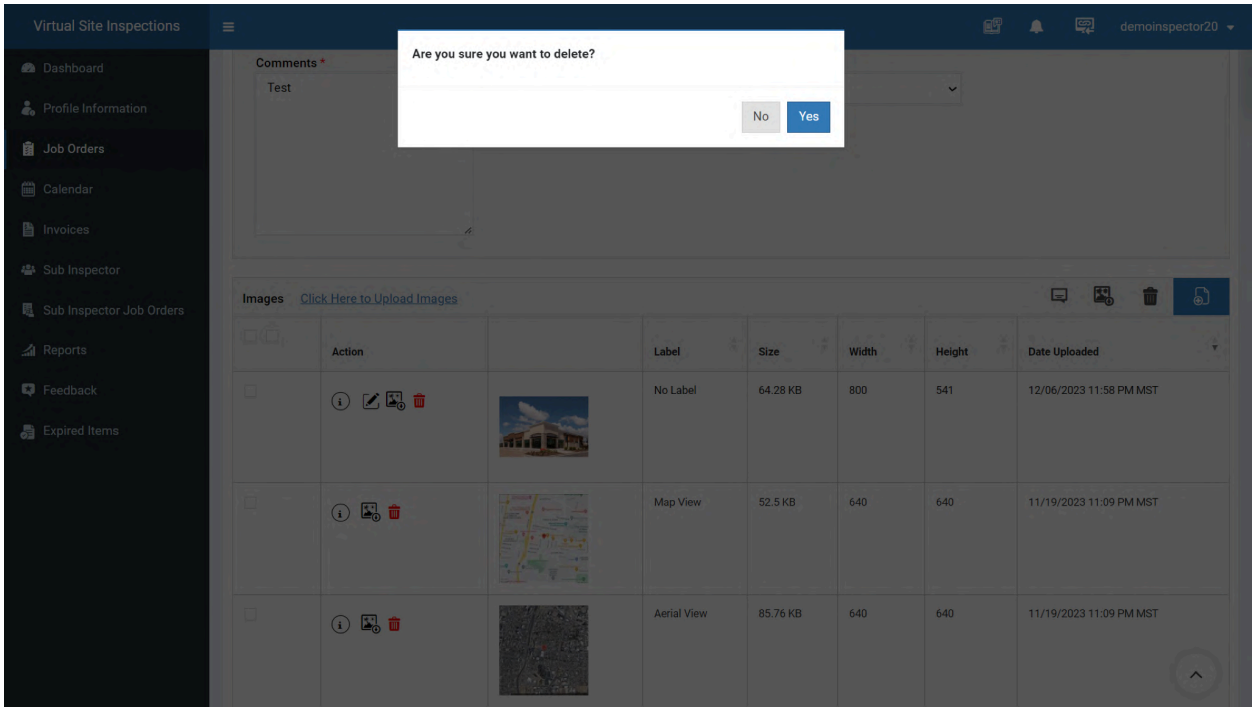


In the list, the initial column features a delete button. This button allows users to remove or delete the corresponding entry from the list.

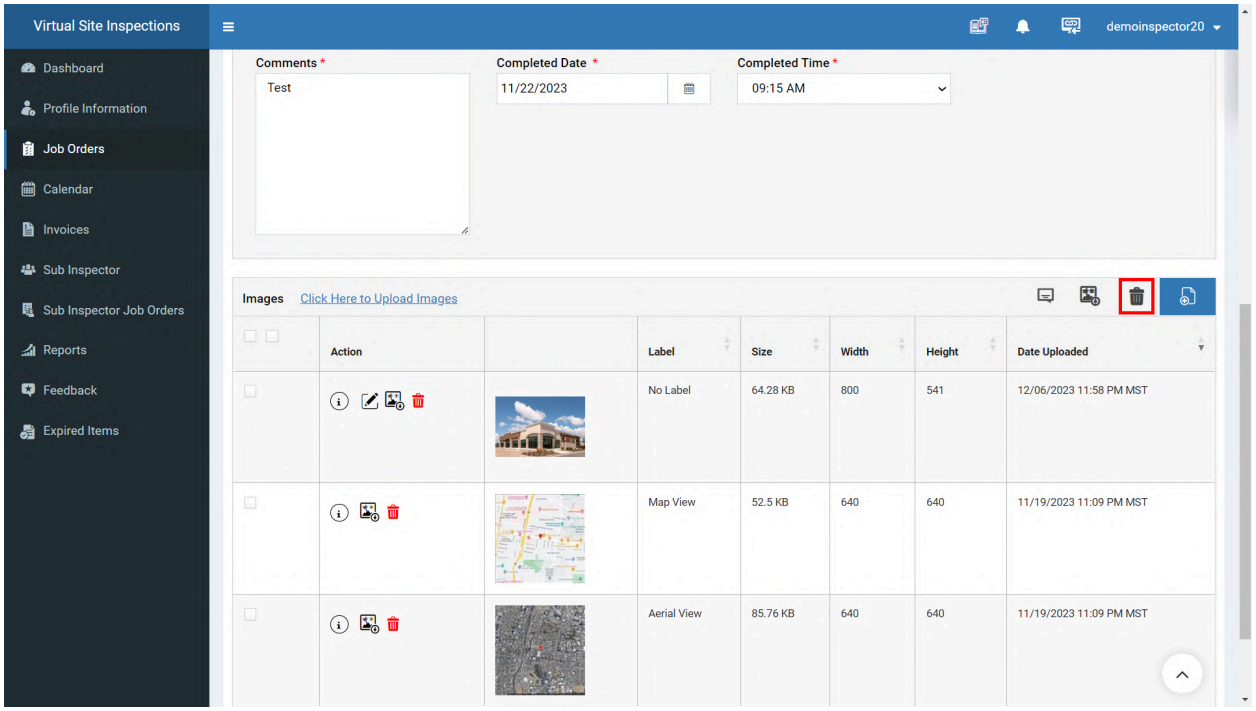


Upon clicking the 'Delete' button, a dialog box will emerge, featuring an alert with the query, 'Are you sure you want to delete ?' Within the dialog, two buttons are available. The first button,

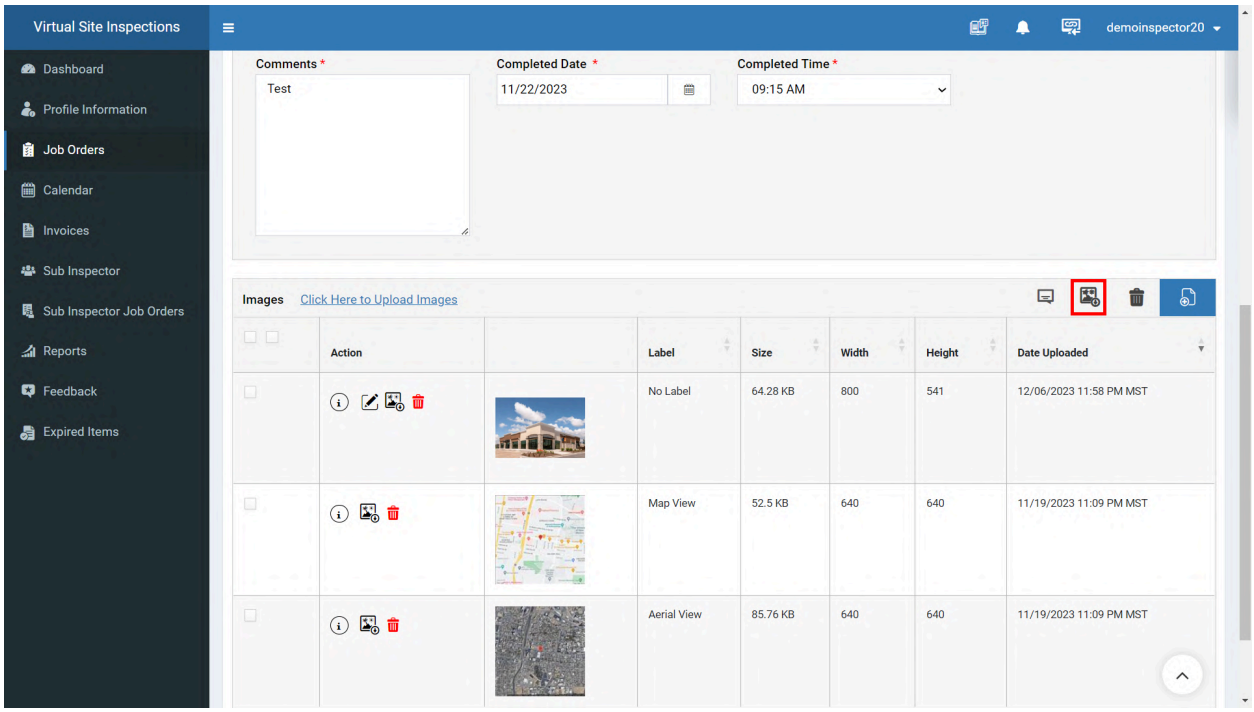
labeled 'Yes' confirms the deletion, subsequently removing the image from the list. The second button, 'No' closes the dialog without performing any action.



We can delete multiple images by selecting them using checkboxes and clicking on the delete button in the top of the image sections, as shown.

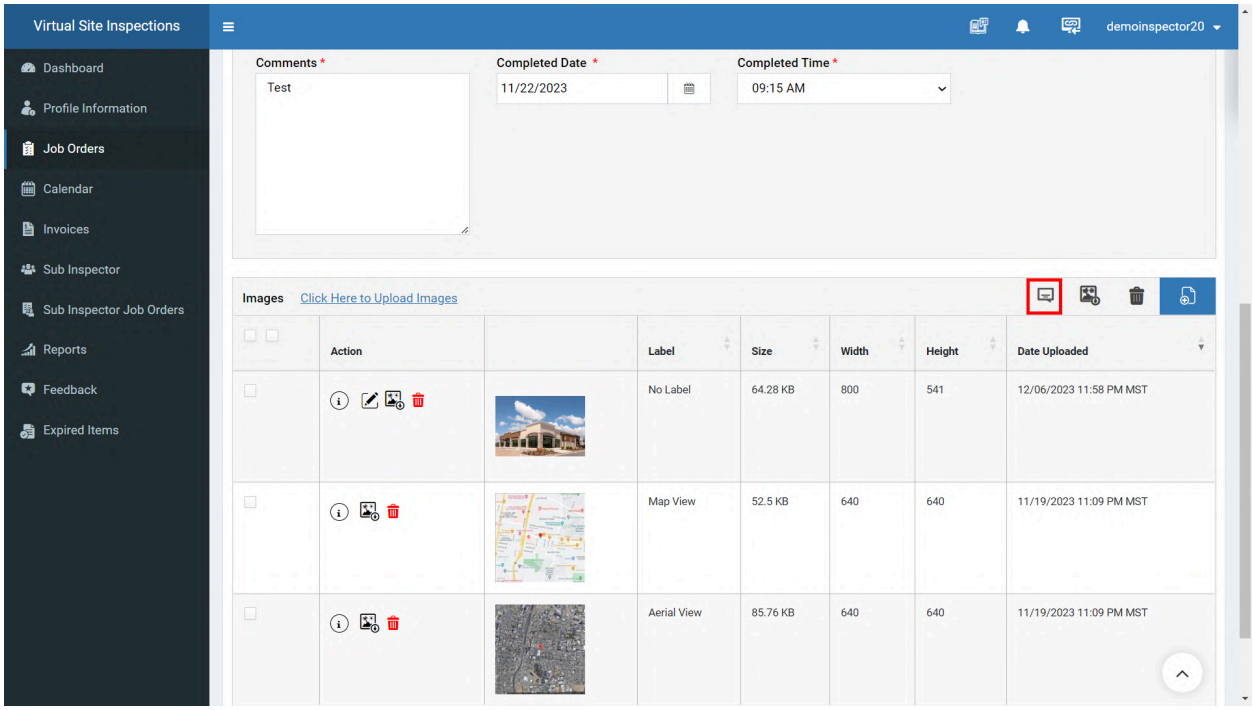


On clicking the 'Download Selected Images' a zip file containing the selected images, marked with checkboxes on the left of each image, will be downloaded.

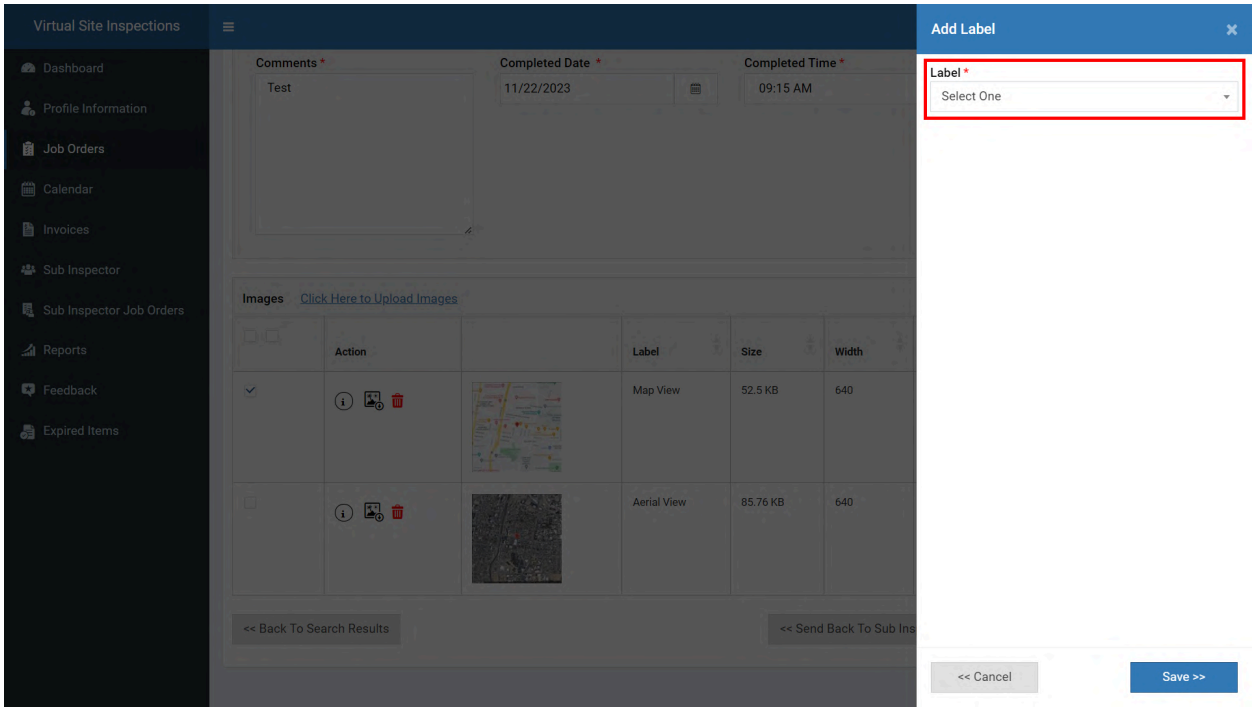


Note: In the images, there are two types of labels: predefined labels and user-defined labels. Predefined labels are mapped with the inspection form and cannot be modified or deleted.

When selecting an image for label updating, clicking the 'Add Label' button will open a side modal on the sidebar.



There, you can choose labels from the dropdown list, and the selected label will be assigned to the chosen image.

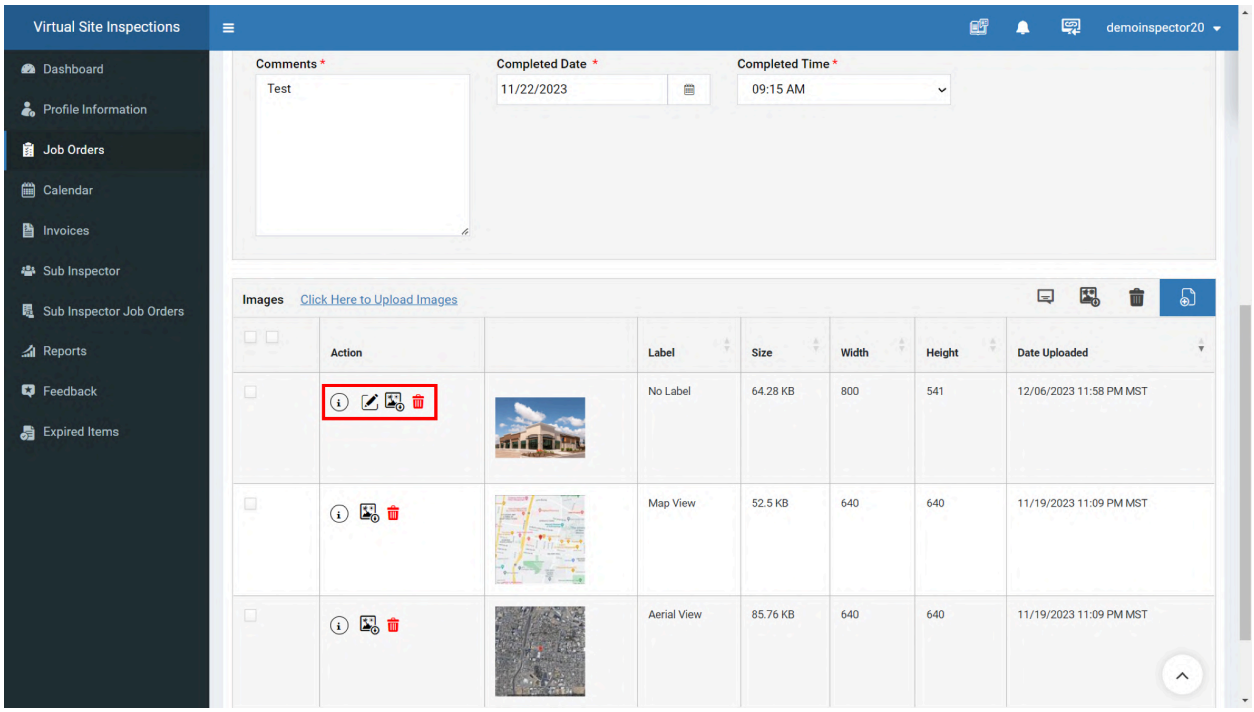


In the image list, the Action column contains multiple icons, including information, download image, and delete button.

On clicking the 'Edit' icon, a edit image popup will appear

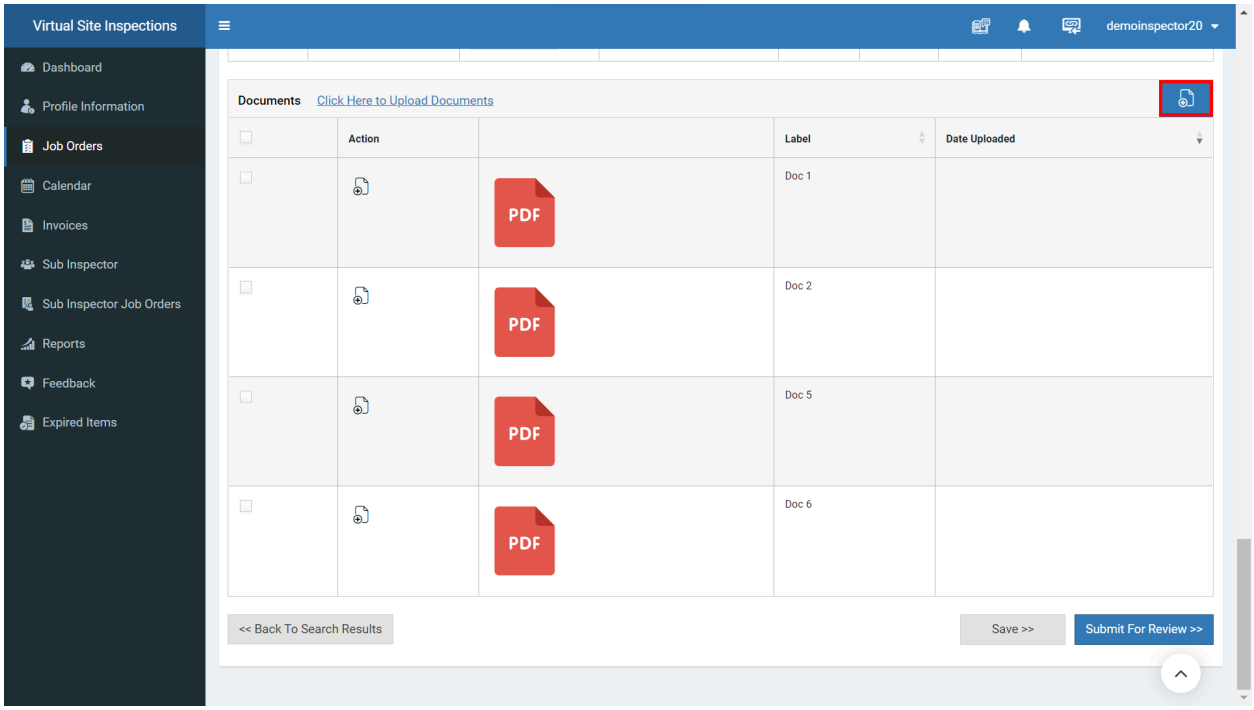
On clicking the 'Information' icon, a popup will open, providing details about the image.

On clicking the 'Download Image' icon, the selected image will be downloaded to your device.

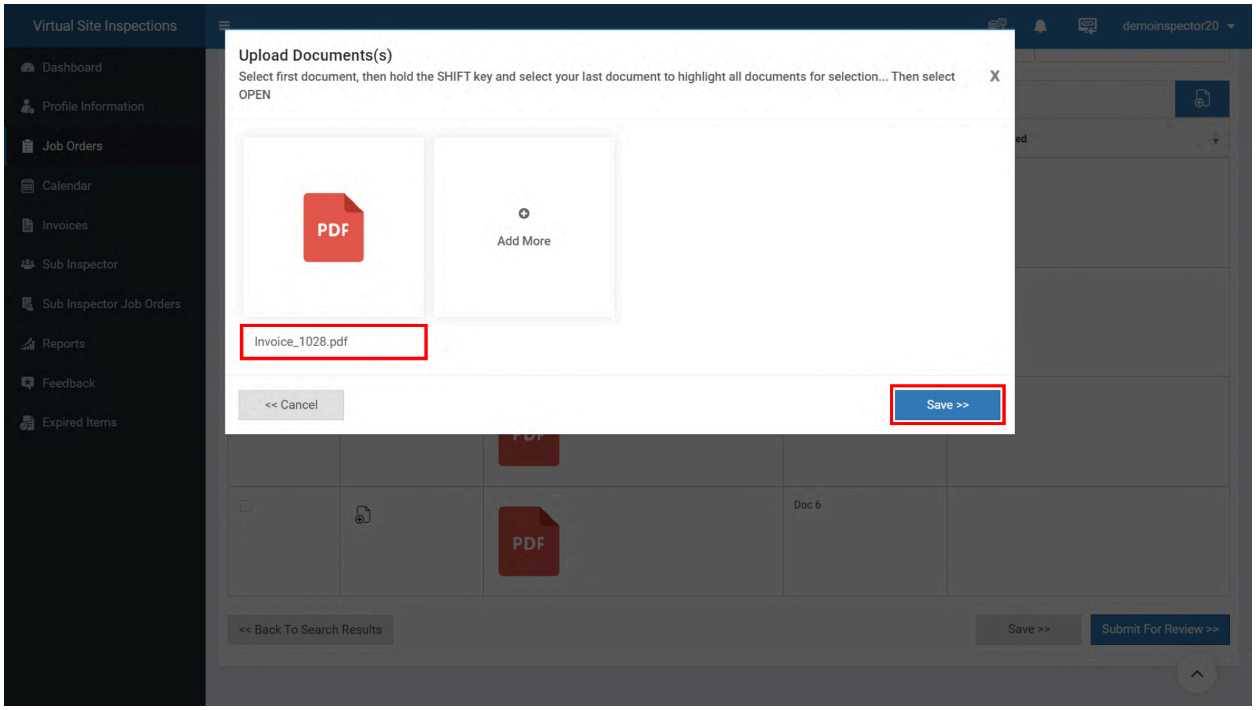


In the Document section, you will find all the uploaded and predefined documents that are mapped in the inspection form, along with their respective label, Date Uploaded.

On clicking the 'Add New' or 'Click Here to Upload Documents' button, a system dialog will open, allowing you to choose your file for upload.



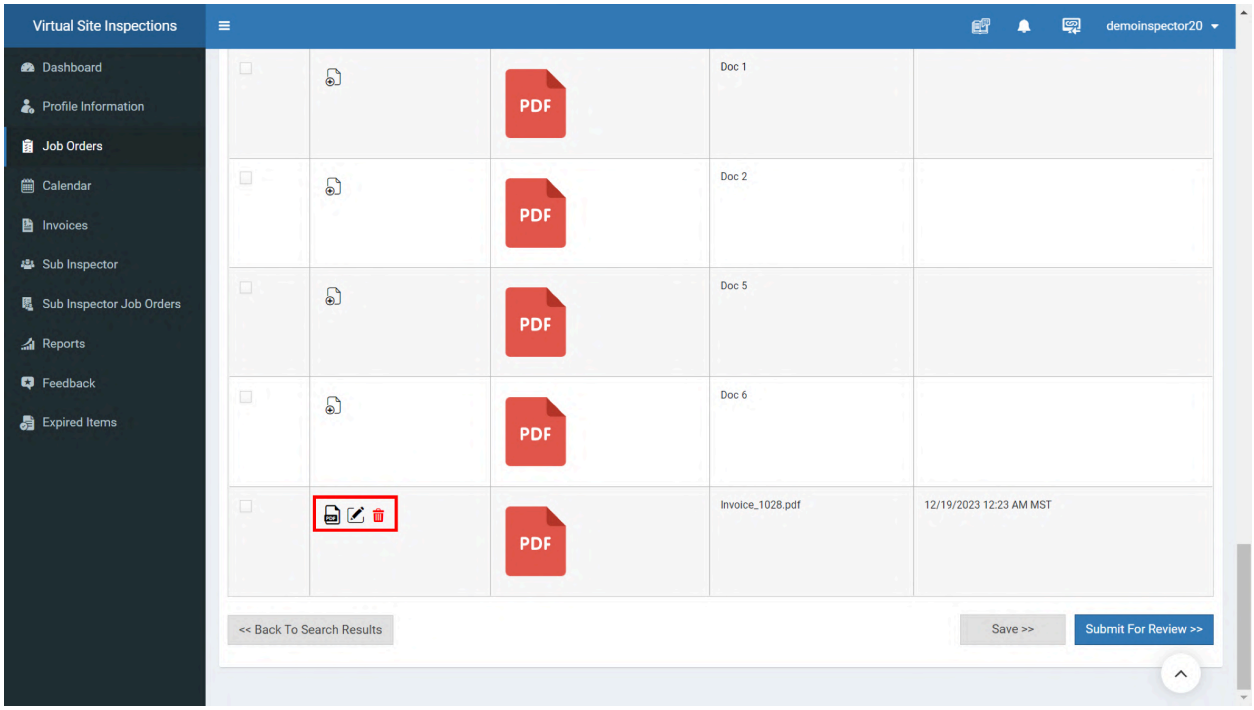
In the dialog, choose the document and click the 'Open' button in the system file selection dialog. This will close the current dialog, and subsequently, another dialog will appear, displaying the selected files. Below, you will encounter the 'Save' button. Clicking on the 'Save' button will temporarily store the documents. For permanent storage along with the job order, it is essential to click on the 'Save' button located at the bottom of the form.



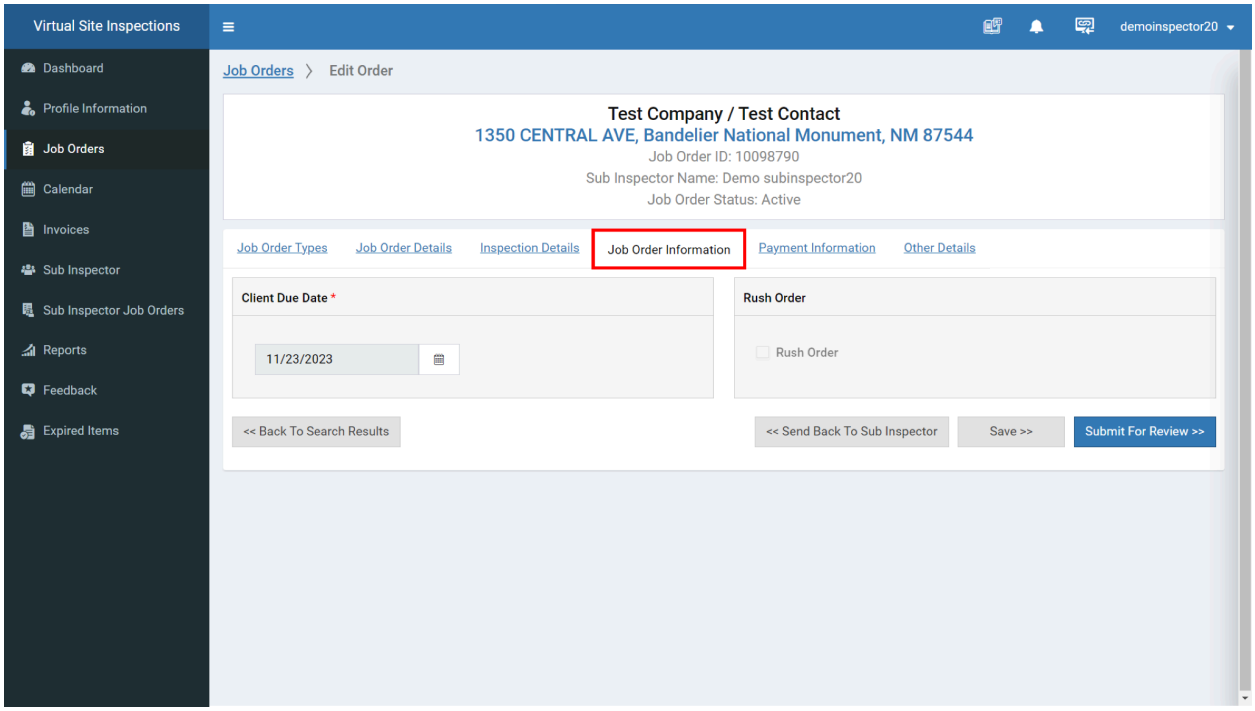
In the document list, the Action column contains multiple icons, including information, download document, and delete button and edit document.

When you click the 'Edit' icon, an edit document popup will appear, allowing you to modify both the document and its name.

When you click the 'Delete document' icon, the document will be temporarily removed from the document list.To save those changes permanently click on the ‘Save’ button located at the bottom of the form.

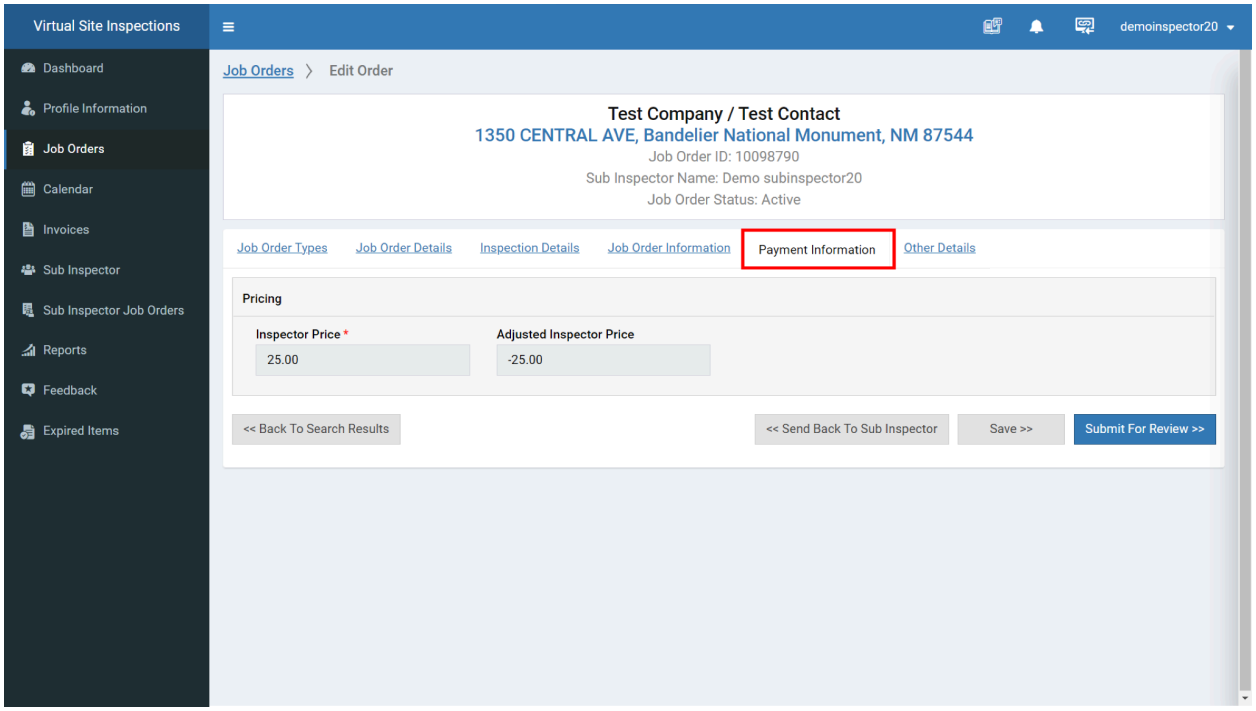


The Job Order Information tab consists of two sections. The first section is the Client Due Date, which displays the specified deadline provided by the client. The second section is the Rush Order section, indicating that the order requires immediate attention and must be completed within a timeframe of two days.



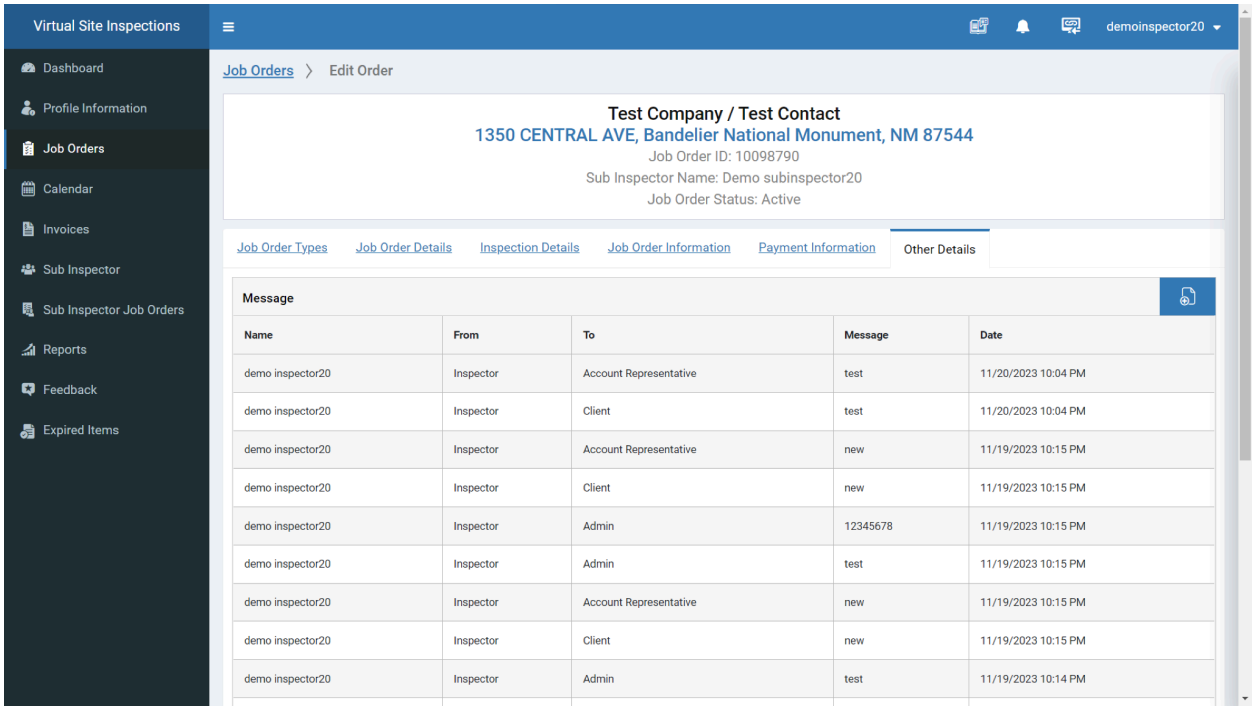
The Payment Information section provides details related to the financial aspects of a transaction.

The Payment Information tab features a Pricing section that includes two key components: the Inspector Price and the Adjusted Inspector Price. The Inspector Price represents the initially quoted cost for the inspection service, while the Adjusted Inspector Price reflects any modifications or adjustments made to the original pricing. This section provides a clear breakdown of the financial details associated with the inspection, ensuring transparency and accuracy in the payment process.

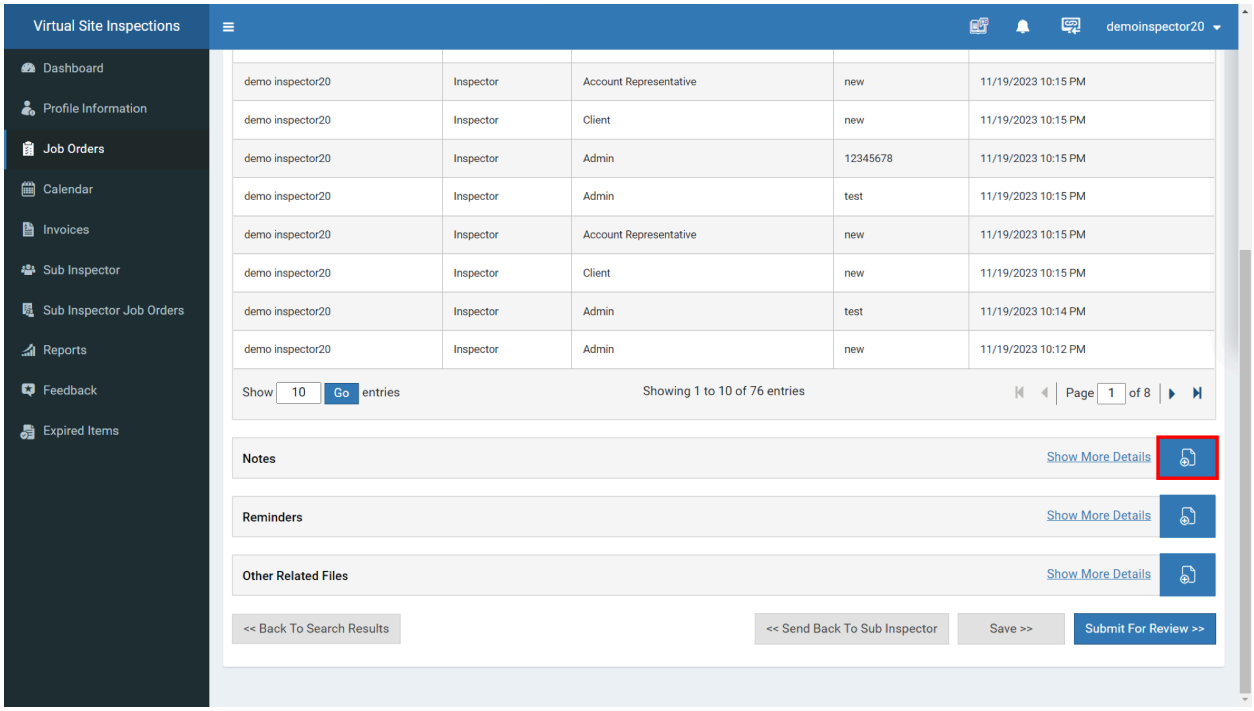


The "Other Details" tab encompasses several essential sections, including a Message section for facilitating communication, a Notes section for recording important details, a Reminder section for setting and managing task-specific deadlines, and Other Related Files section for attaching and accessing supplementary documents or materials. This comprehensive arrangement ensures effective organization, communication, and documentation within the context of the task or project.

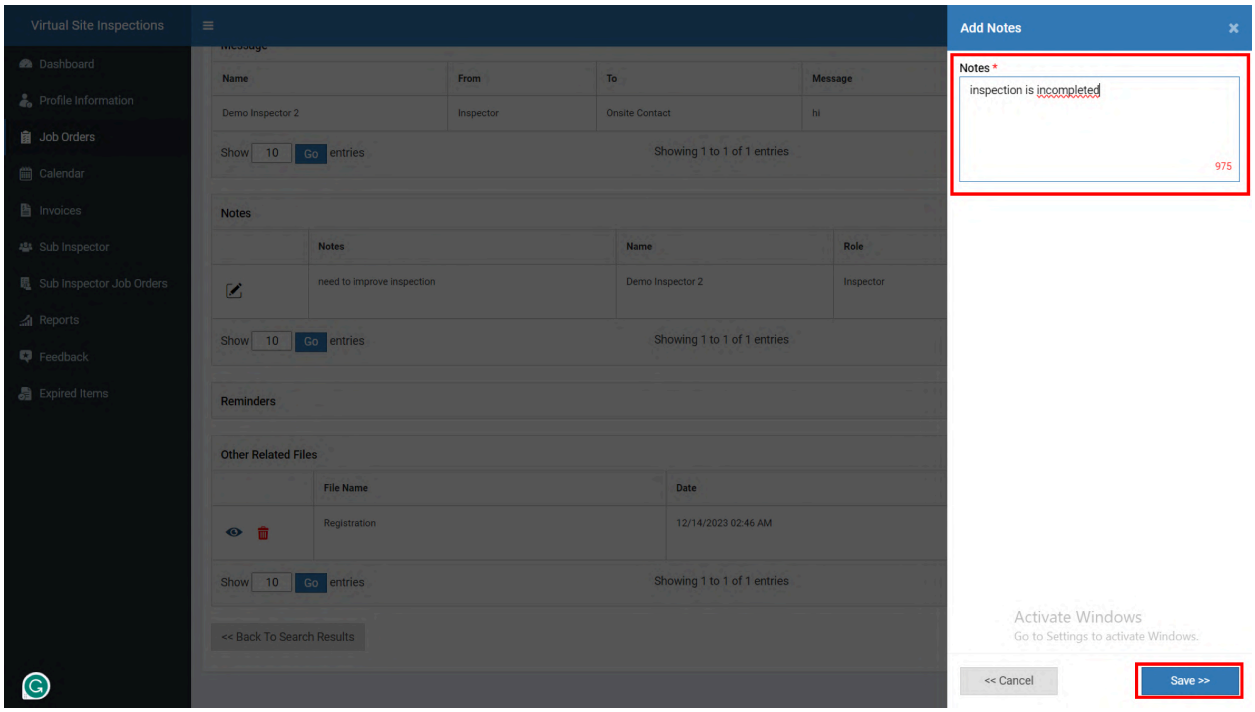
The Message section gathers messages with sender and recipient details, content, and date. Inspectors employ this module for sending task-related messages, ensuring transparent communication regarding job order details. The process for sending messages follows the steps explained on the subsequent page.



The Notes section is utilized to add relevant notes for this specific job order. Inspectors can add notes by clicking on the "Add New" icon, allowing them to include additional information or observations related to the job order.

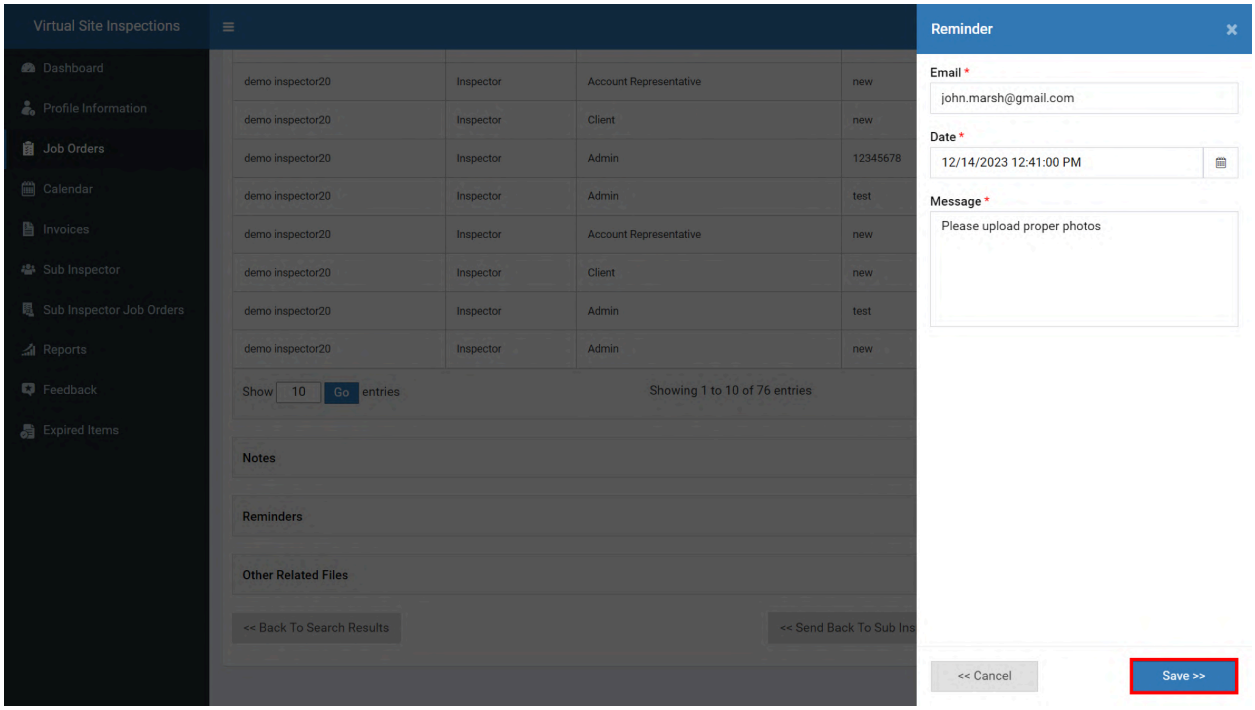


Upon clicking the "Add New" icon, a side modal window appears. Within this modal, inspectors can input notes into a text area. After entering the notes, clicking the "Save" button will close the side modal, and the newly added notes will be included in the notes list for the job order.



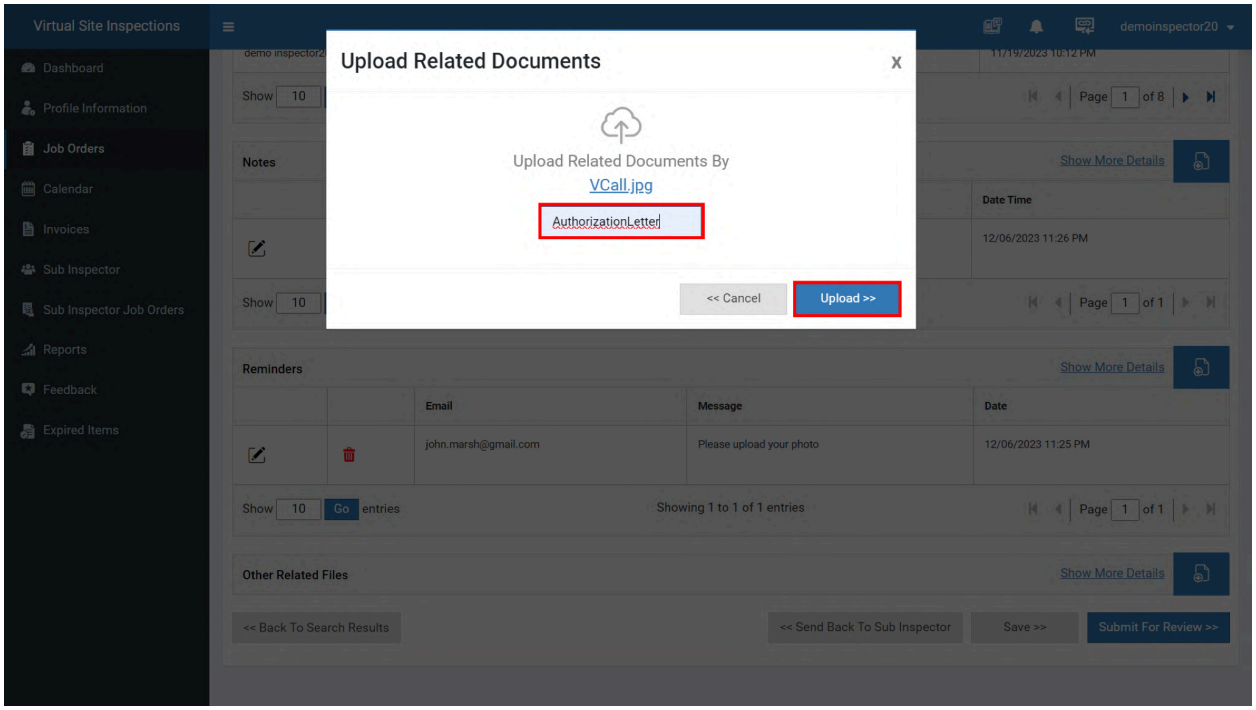
Inspectors can edit notes by clicking on the edit icon, providing them with the ability to make necessary modifications to the content of the notes.

The Reminder feature is employed to set reminders. Clicking on the "Add New" icon opens a side modal where users can input details such as email, date, and message. After completing all the required information, clicking the "Save" button adds the reminder to the list. Additionally, an email notification is sent at the specified date and time to serve as a reminder for the user.

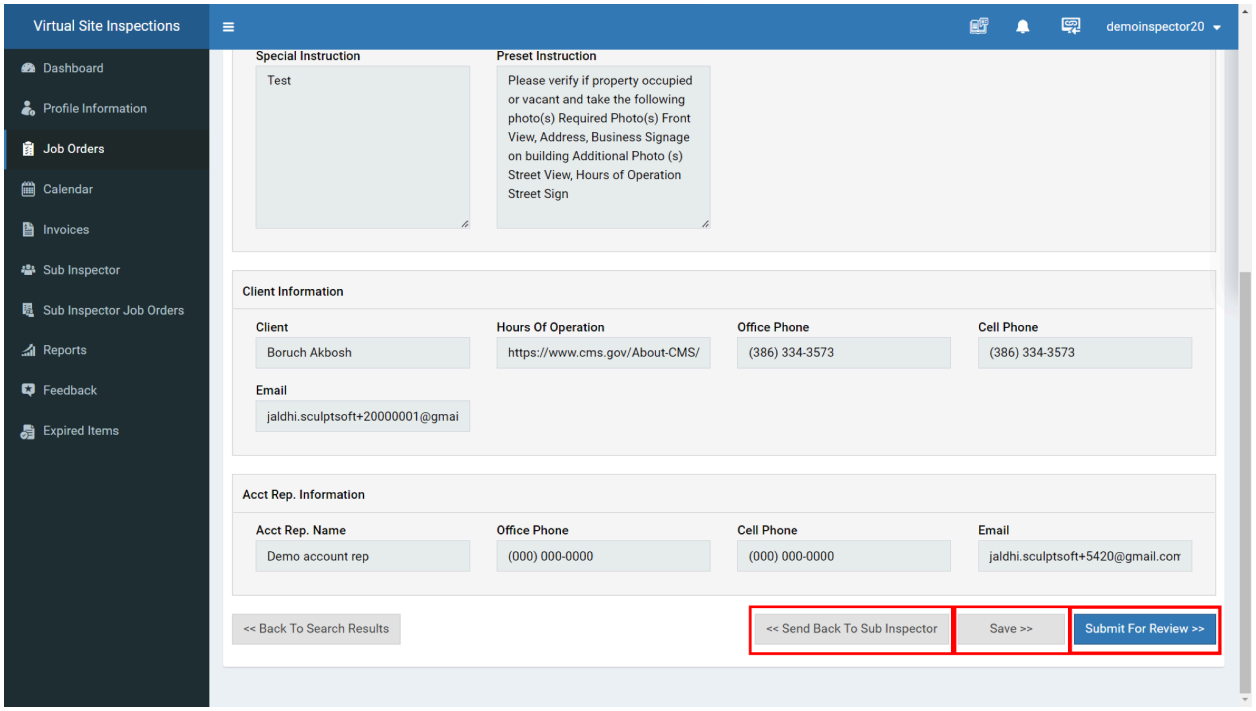


Inspectors have the option to both edit and delete reminders within the reminder list. This functionality allows them to make changes to existing reminders or remove ones that are no longer needed.

In the "Other Related Files" section, inspectors can upload additional documents by clicking on the add icon. After uploading a document, inspectors have the flexibility to view and delete it if necessary. This feature enhances organizational efficiency, allowing inspectors to manage supplementary files associated with the task or project.

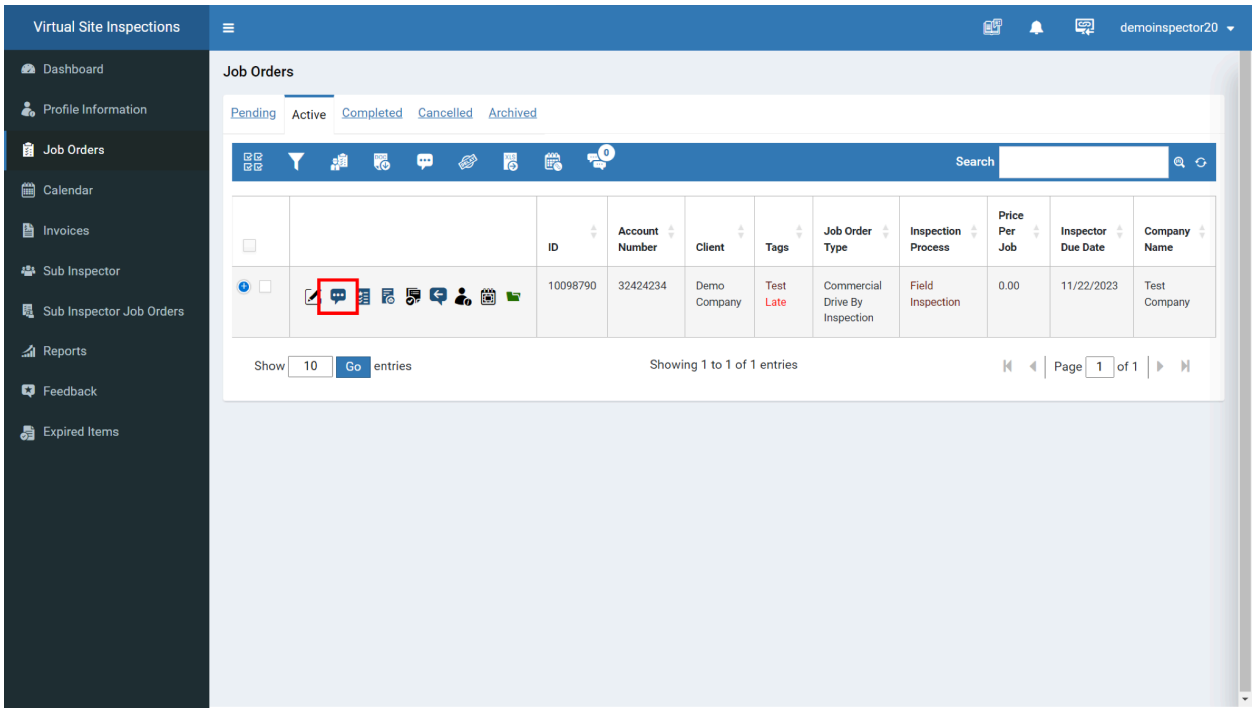


Within the job order editing interface, three buttons are present: "Send Back to Sub Inspector", "Save", and "Submit for Review." If the "Send Back to Sub Inspector" button is clicked, the order will be redirected to the sub-inspector job order list. Clicking the "Save" button will preserve any changes made, while selecting the "Submit for Review" button will initiate the submission of the order for administrative review.



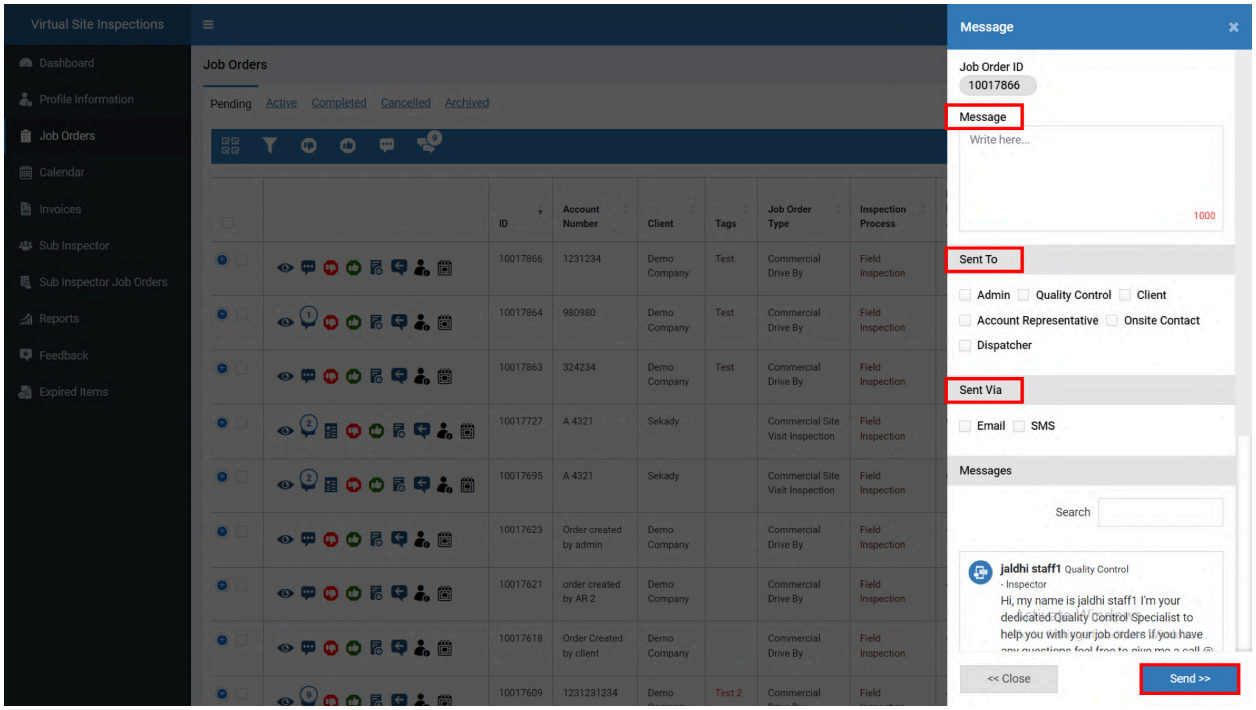
Message

The "Message" functionality allows users to send messages to various recipients such as Client, Quality Control, Account Representative, Admin. To send a message or View received messages, you need to click on the message icon from a specific job order item, as illustrated in the provided screenshot below.



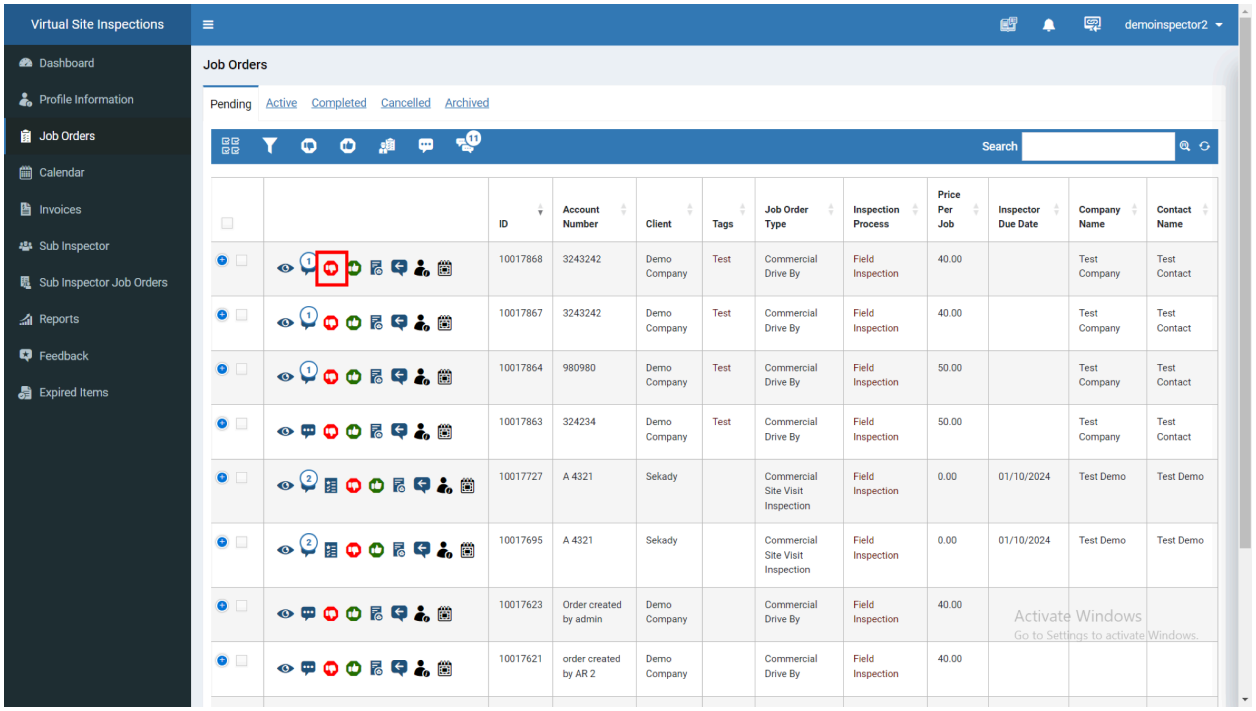
After clicking on the message icon, a pop-up will appear, prompting you to input the message content. In this pop-up, You can select the Text Message option in the “Select Message Type” Field, then add your message and select the recipients from the "Sent To" section. Additionally, you can choose the channel through which the message will be sent by selecting the appropriate option in the "Sent Via" section, as illustrated in the provided screenshot and then hit on the ‘Send >>’ button to send the message.

Inspector can see the message history in the message panel at the bottom.



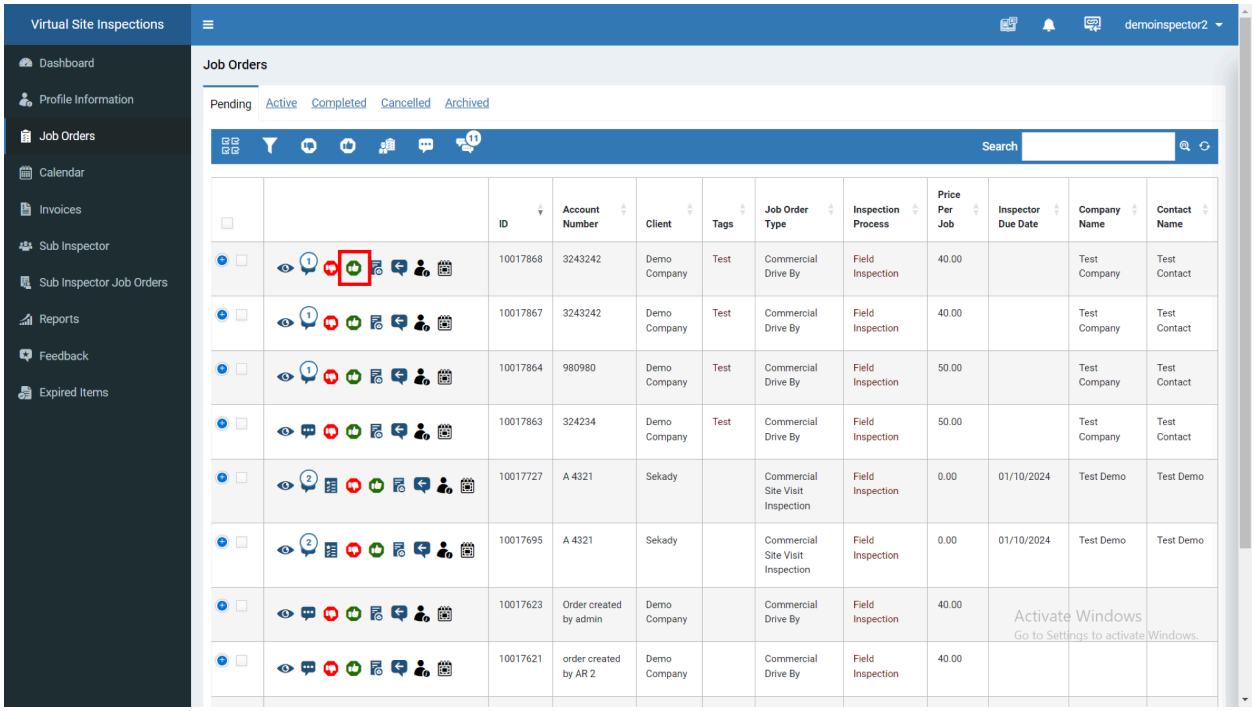
Decline Order

Inspectors can choose not to take on a job by using the decline functionality. This feature is specifically designed for rejecting a single job order, and the steps involved in the process remain the same as when declining multiple job orders. Decline orders will be removed from the pending list and assigned to a different inspector.



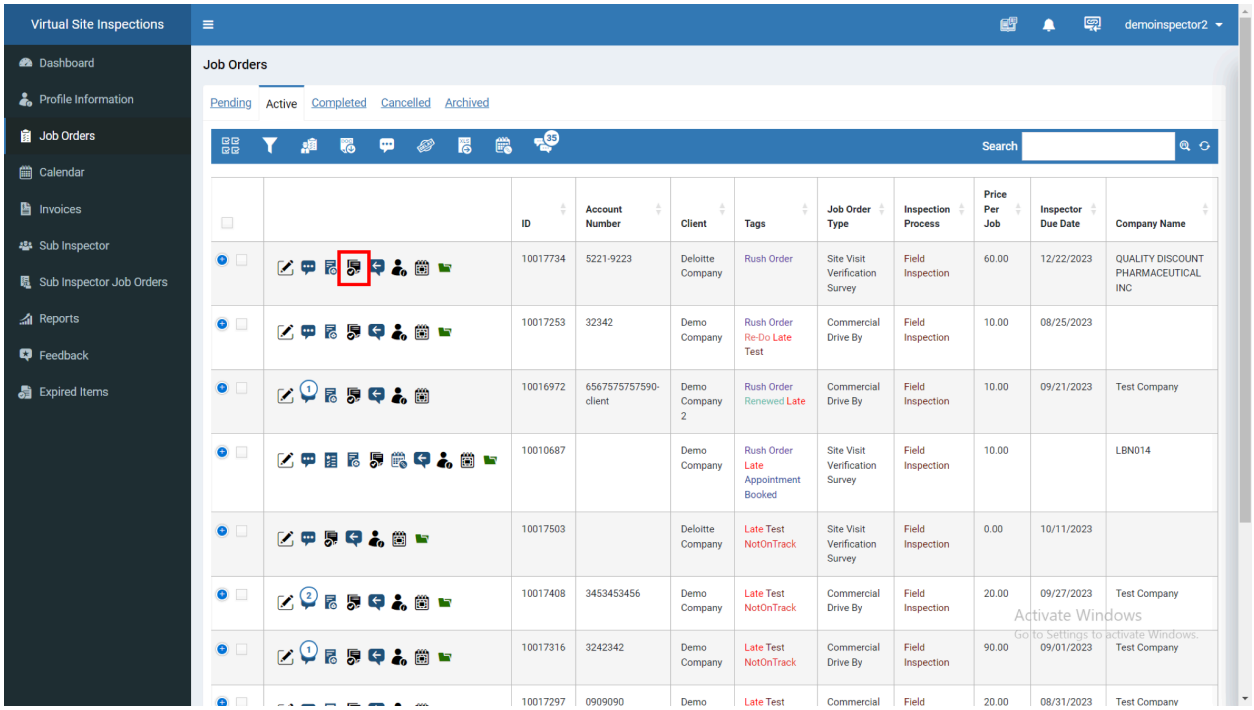
Accept Order

Inspectors have the option to accept a job by using the accept functionality. This feature is specifically designed for accepting a single job order, and the steps involved in the process remain the same as when accepting multiple job orders. By Accepting you confirm that the job order inspection will be conducted by you.



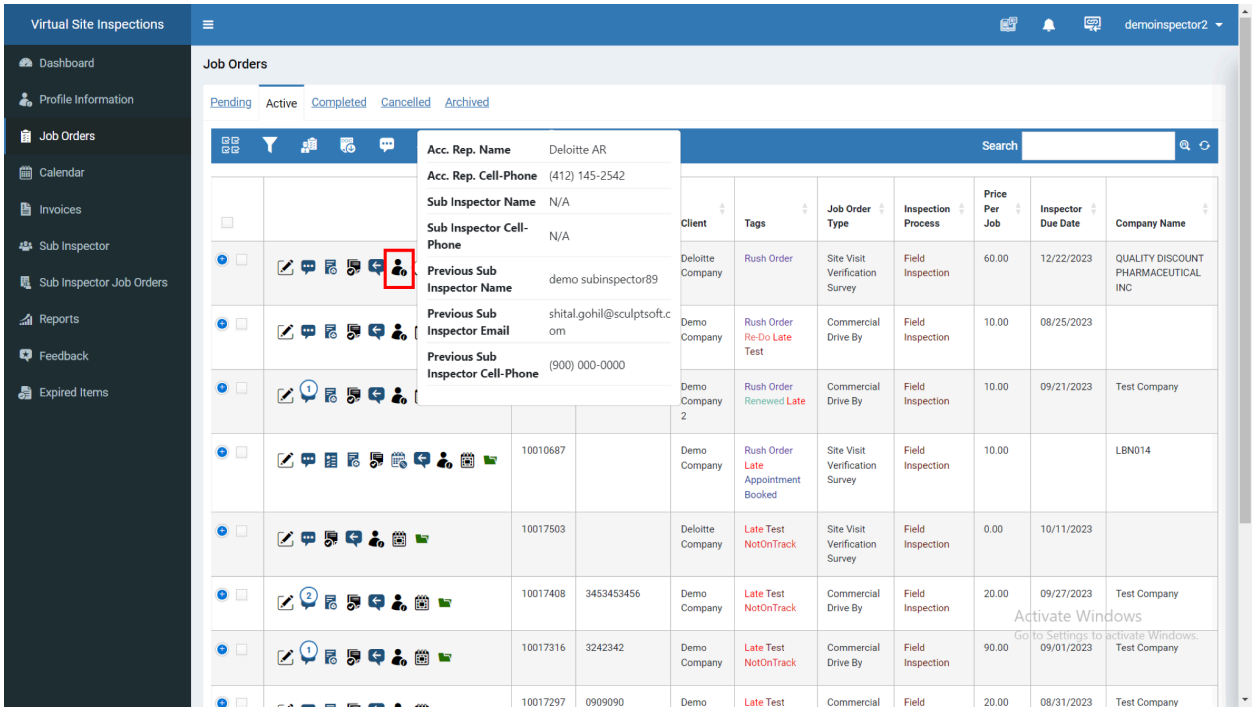
Assign Sub Inspector

The "Assign Sub-Inspector" to job order functionality enables inspectors to assign a single job order to sub-inspector. All the steps involved are the same as when assigning multiple job orders to sub-inspectors.



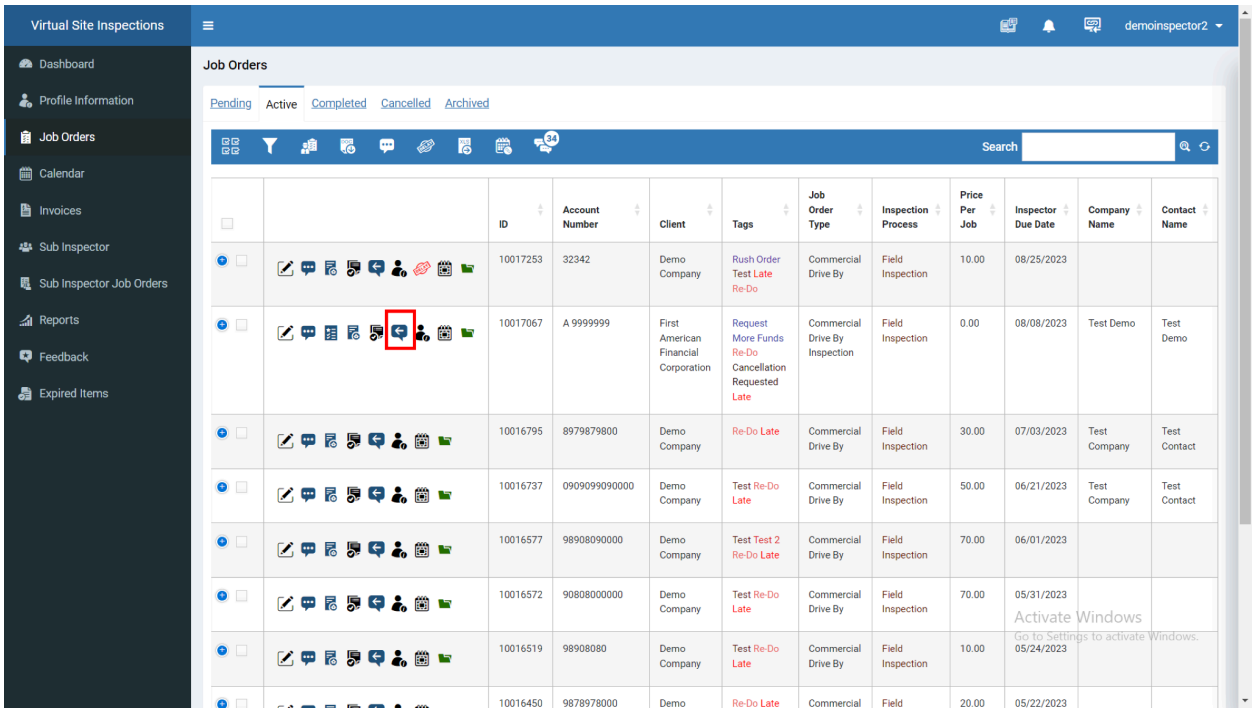
User Information

This feature provides user details associated with specific job orders, including roles such as Assigned Sub Inspector, Previous Sub Inspector, Quality Control and Account Representative.

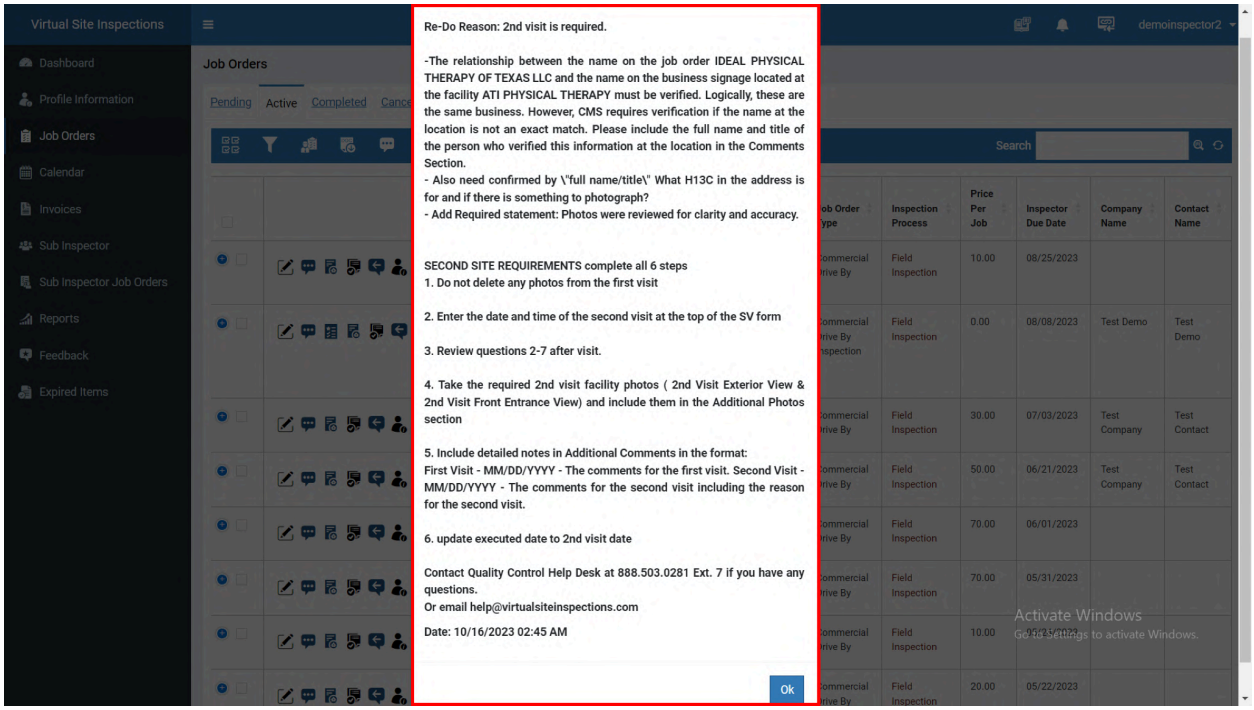


Send Back Reason

This feature shows the reason for sending back or redoing a specific job order, as illustrated in the provided screenshot. The "Send Back/Redo Reason" feature enhances transparency and communication by providing clear reasons for why a particular job order has been sent back or marked for redo. It promotes collaboration between the client, quality control team,Admin, Dispatcher facilitating a clear understanding of the required modifications or improvements.

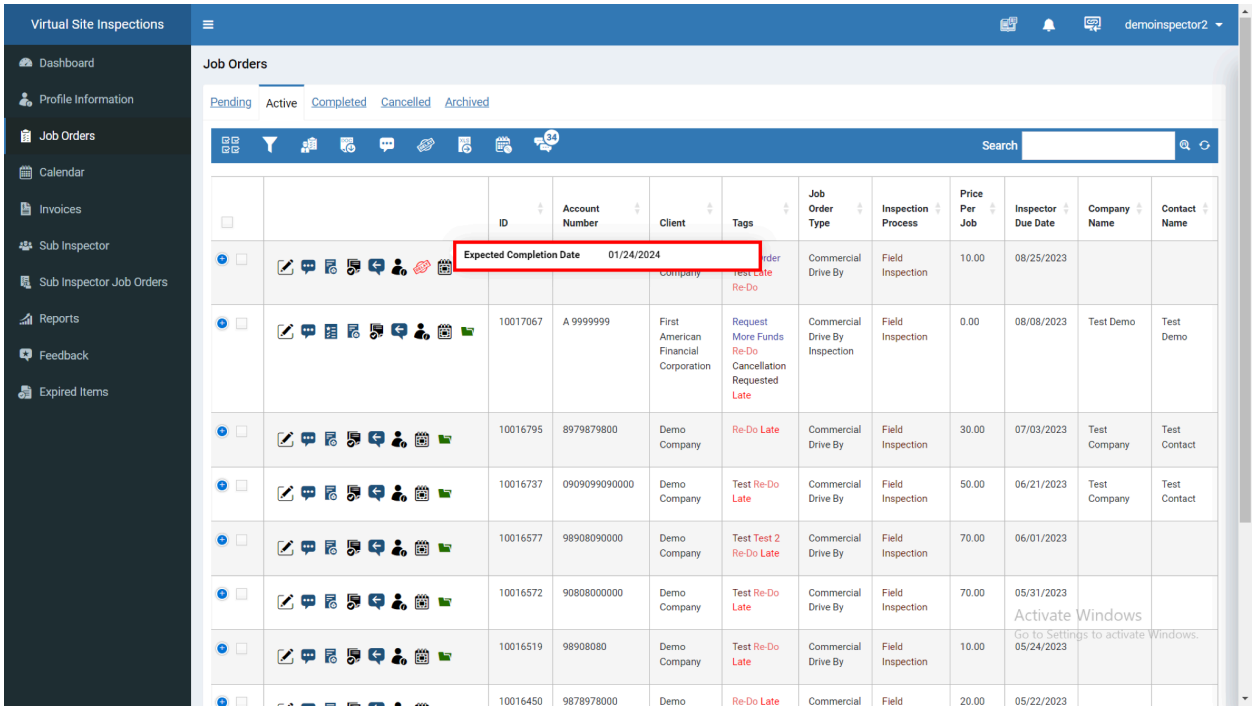


On clicking the send back reason icon, It will show that job order send back/redo reason otherwise It will show reason ‘there is no Re-Do tag available’ in dialog.



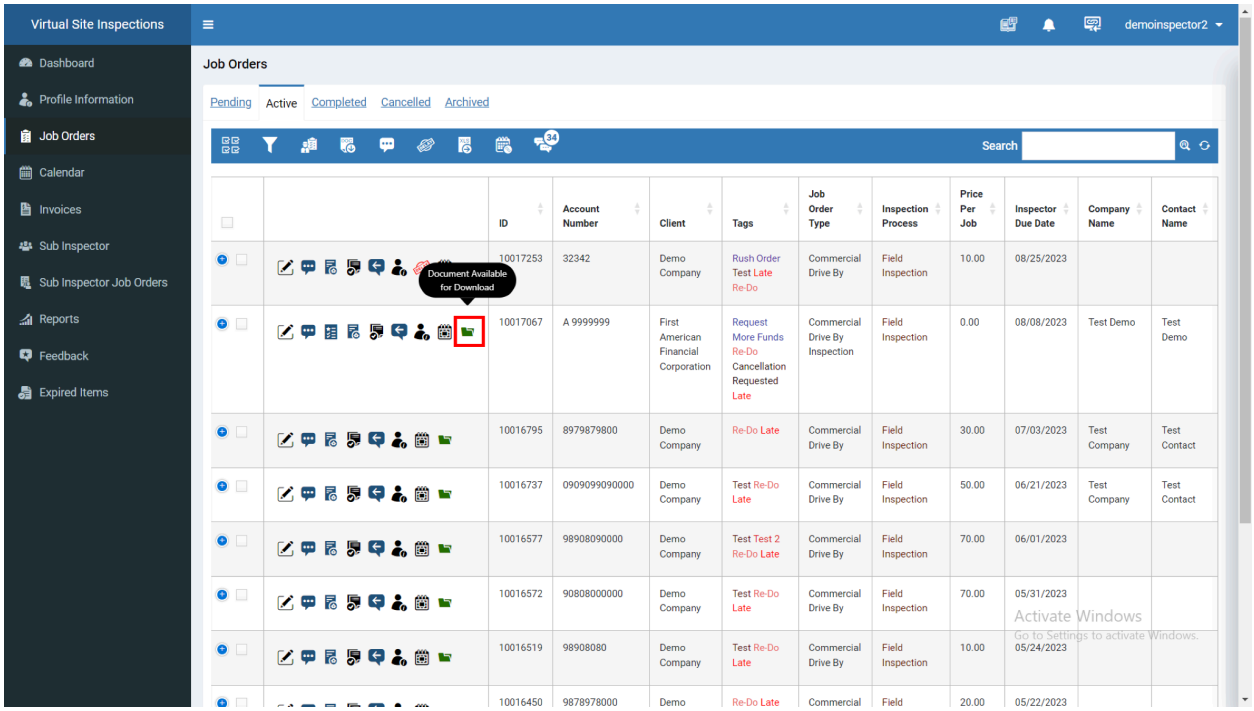
Appointment Date & Time

This feature shows the appointment date and time if the appointment is scheduled for the job order otherwise It will show N/A, as illustrated in the provided screenshot.The "Appointment Date and Time Display" feature enhances visibility and organization by presenting crucial information about scheduled appointments for specific job orders. This feature is designed to streamline the process of managing appointments, ensuring that relevant parties have quick access to appointment details.



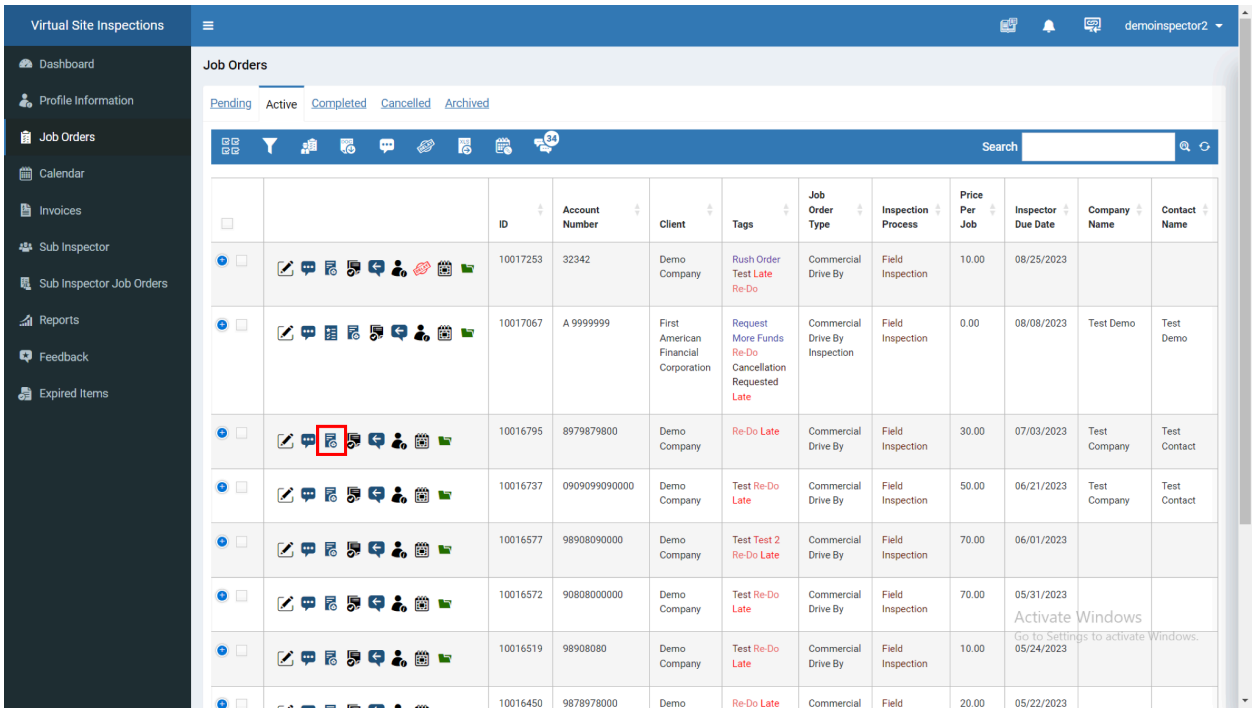
Document Available for Download

In the "Edit" or "Create Job Order" process, when the "Client Letter Campaign Series" is selected or other files are uploaded, the document availability icon appears in the job order grid. Conversely, if these conditions are not met, the icon will not be displayed in the grid, as depicted in the provided screenshot.

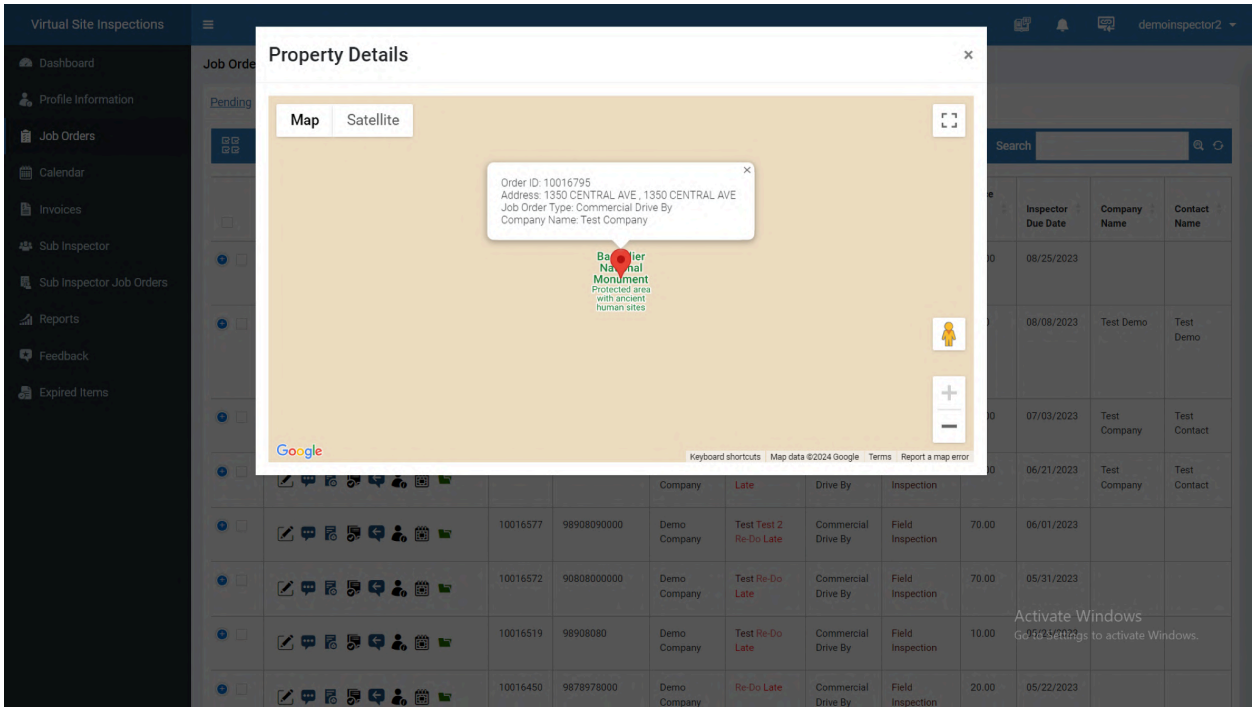


Property Detail

The "Property Detail" icon is utilized to display the real-time location of the property associated with the job order.



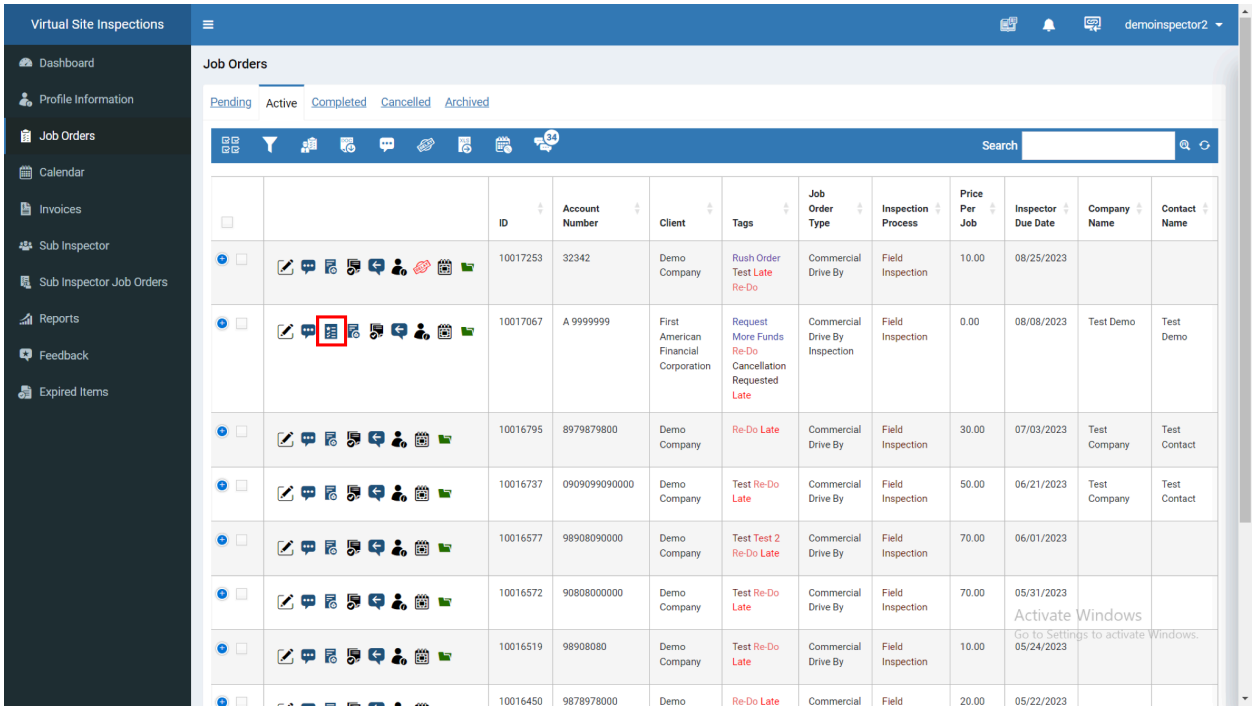
Upon clicking the property detail icon, a pop-up will appear on the screen with two options: map view and satellite view. By default, the map view is displayed, indicating the location with associated details. To switch to satellite view, users can tap on the respective button, which will open the satellite view along with additional details.Additionally, if users drag the Pegman icon onto the map view, it reveals a street view image.



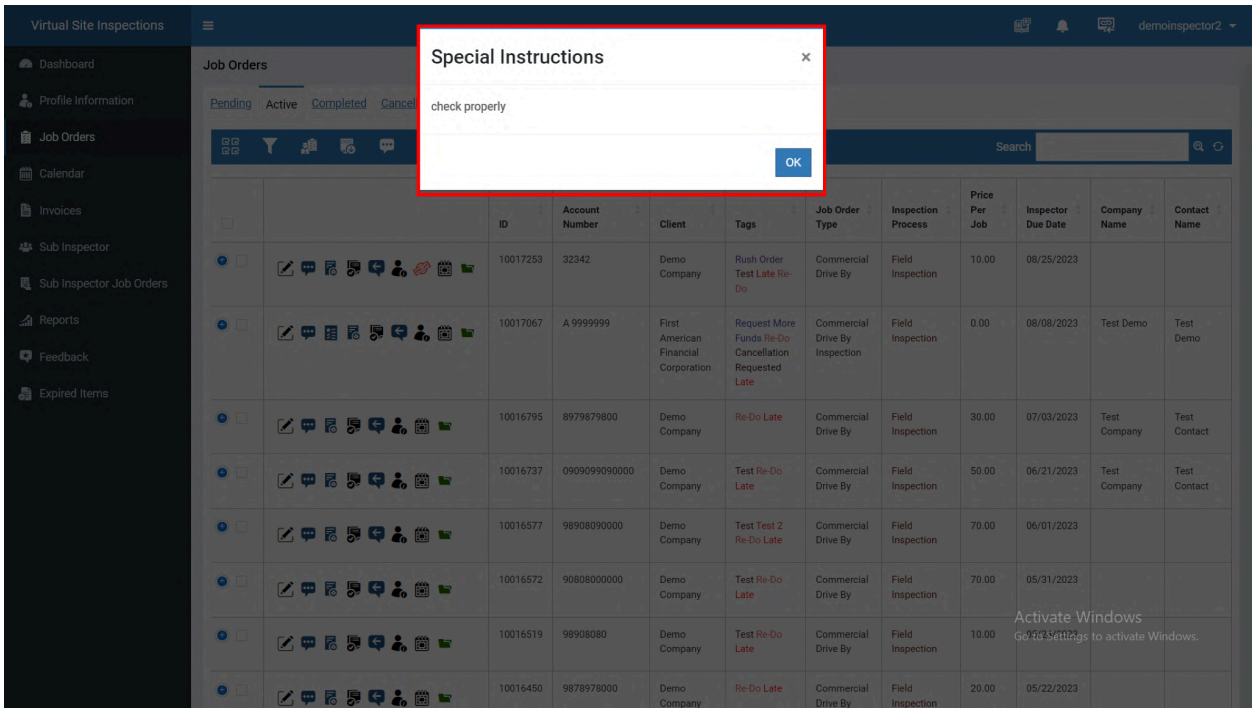
Special Instructions

Special instructions in a job order function as supplementary guidelines or specific details that must be adhered to when executing a task.

The "Special Instructions" icon is visible only when instructions are added to the job order. Otherwise, it will not be displayed, as illustrated in the provided screenshot.

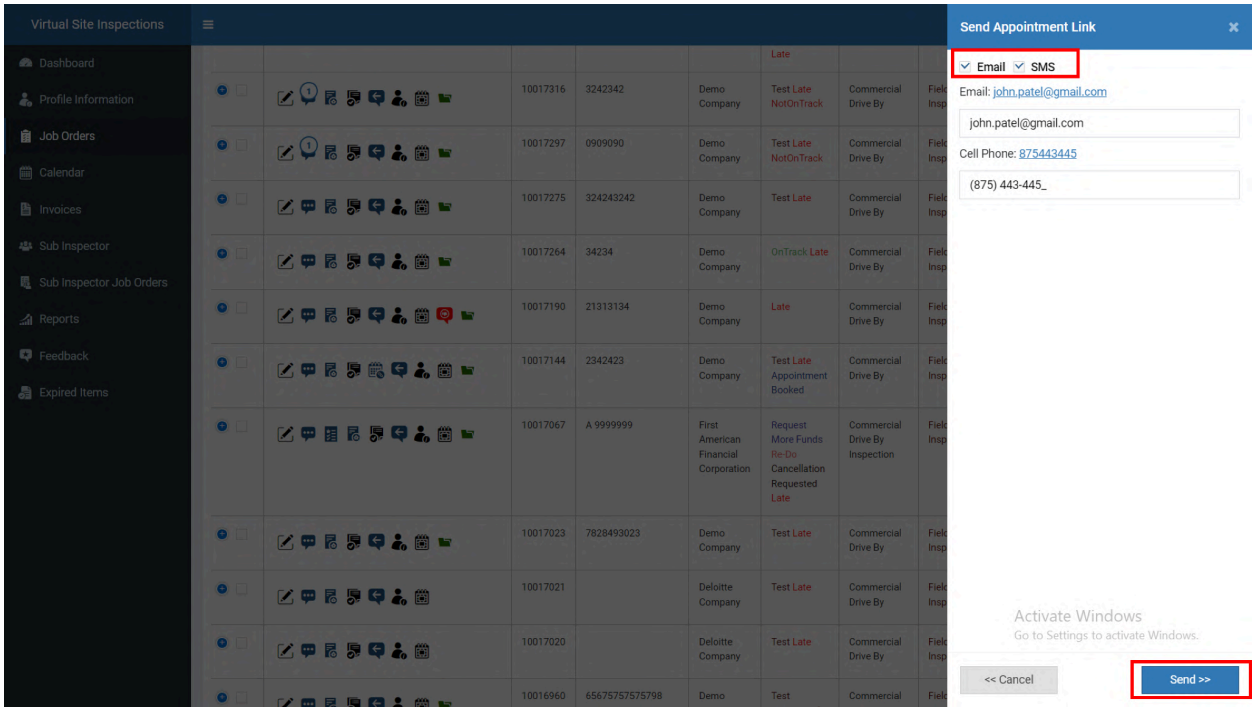


Upon clicking on the "Special Instructions" icon, a pop-up will appear containing guidelines or insturctions. The pop-up includes an "OK" button; clicking on it will dismiss the pop-up.



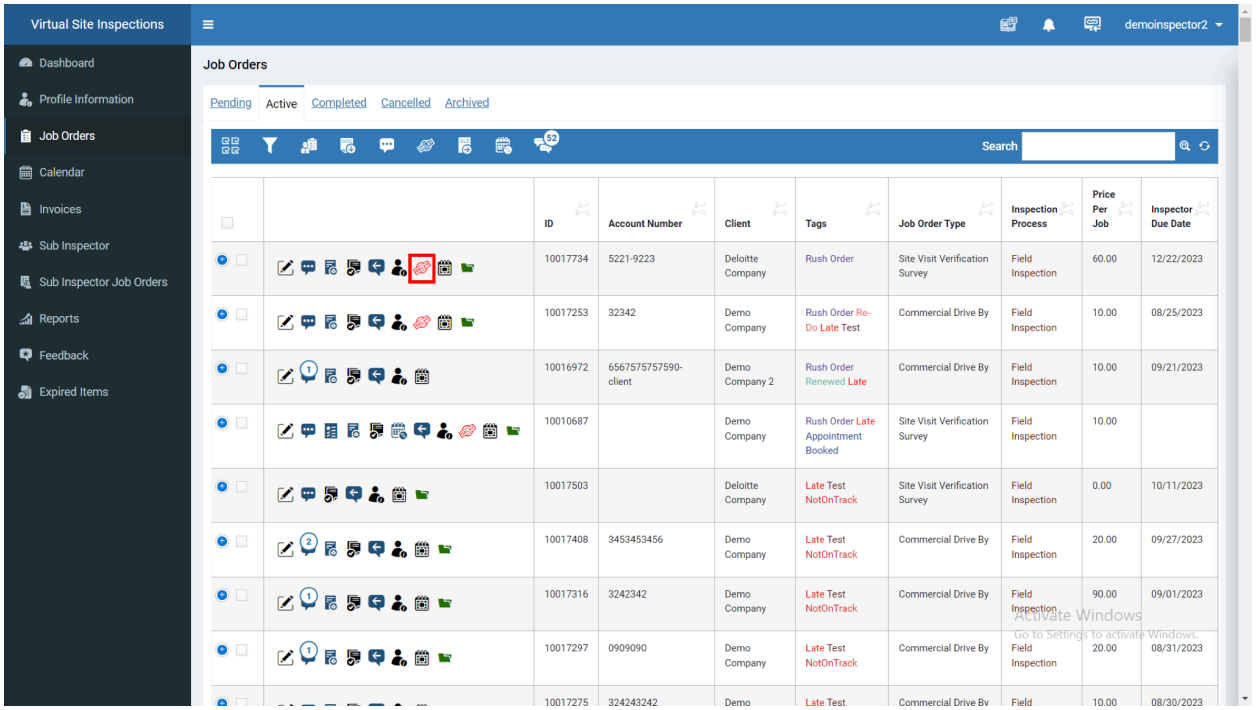
Send Appointment Link

The "Send Appointment Link" feature is designed to dispatch an appointment link to the onsite contact. When activated, it opens a side modal presenting two options: Email and SMS. If the email checkbox is selected, the modal displays an email box pre-filled with the onsite contact's email. Alternatively, if the SMS checkbox is chosen, the modal shows a Cell Phone text box populated with the onsite contact's number. Clicking the "Send" button transmits the appointment link to the onsite contact through the selected communication method.

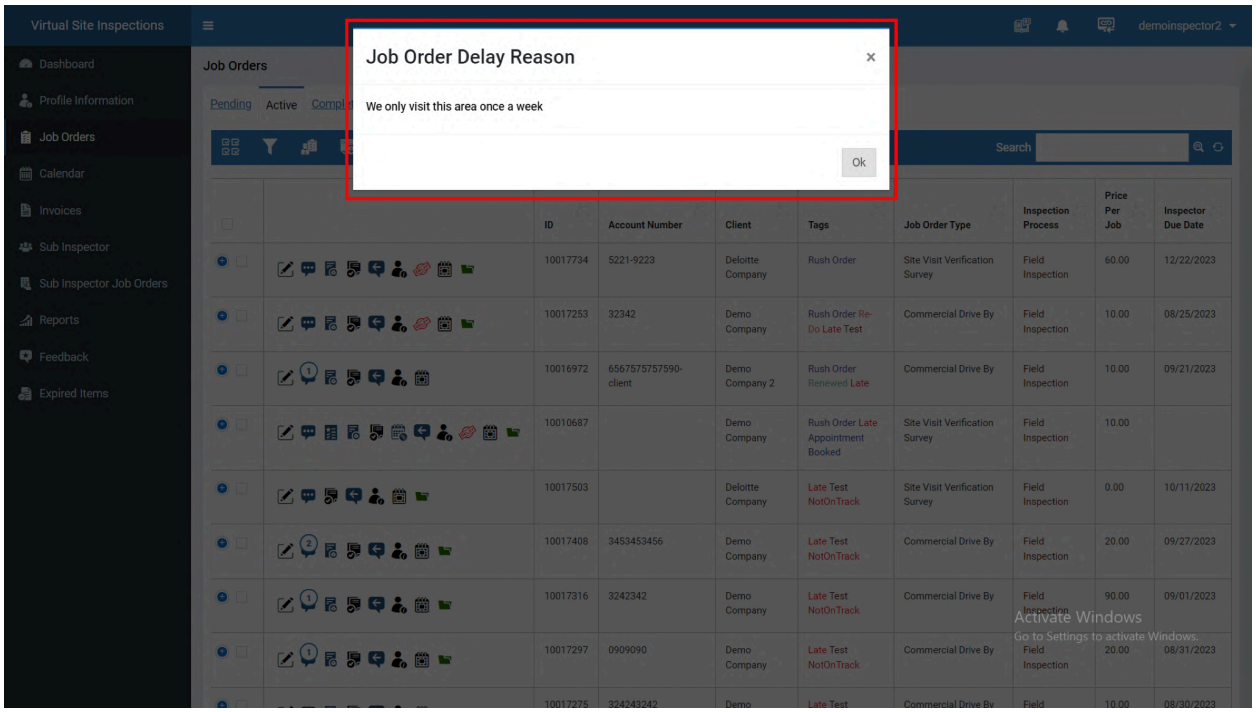


Delay reason

The Delay Reason icon exclusively displays job order that have been marked as delayed, as elucidated in the previously explained "Mark as Delay" functionality.



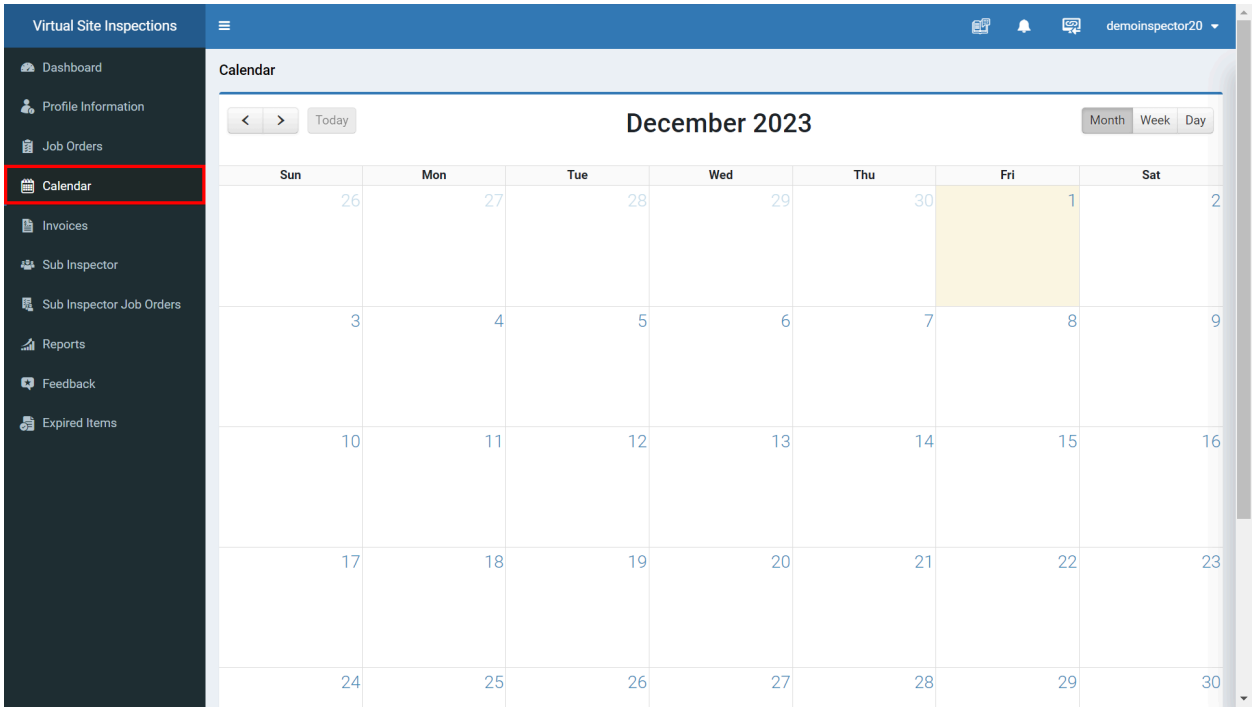
Clicking on the Delay Reason icon triggers a popup box that reveals the specific delay reason. The box is equipped with an "OK" button, and upon clicking it, the dialog box is dismissed.



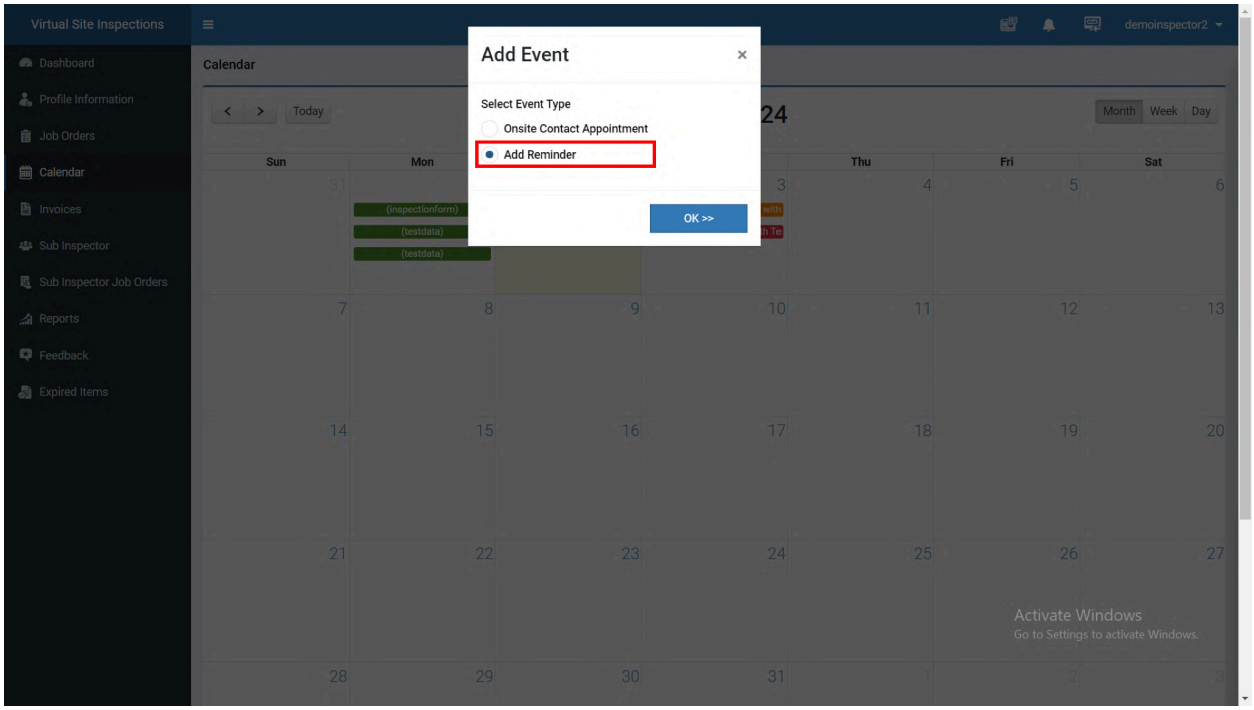
Calendar

The calendar function is utilized for adding events, and it allows users to set reminders and display events in a specific date and time format.

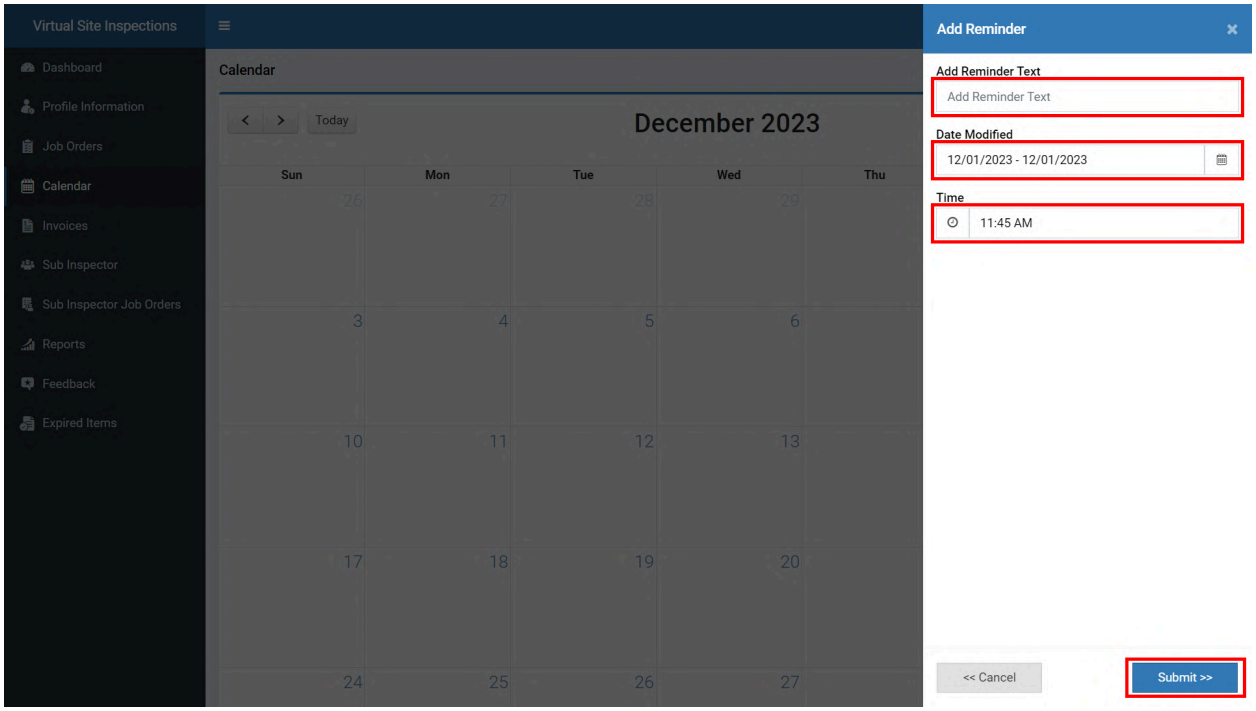
Inspectors can view all events which are booked, rescheduled, and cancelled events by selecting the 'Calendar' menu in the left-side panel. These actions will redirect users to the Calendar page.



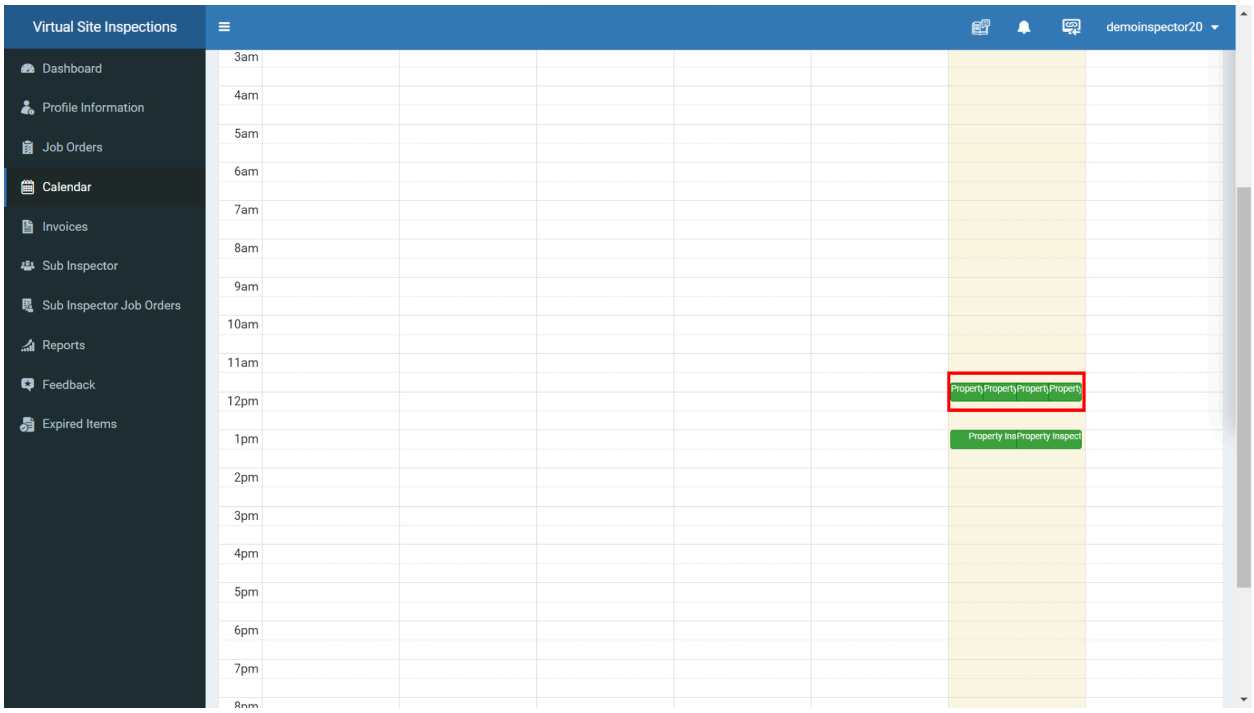
When you click on a date, a box will pop up. You can put in a reminder by clicking the "Reminder" button and then pressing "OK." Just remember, you can't add reminders for dates that have already passed. Check out the screenshot below for a visual guide.



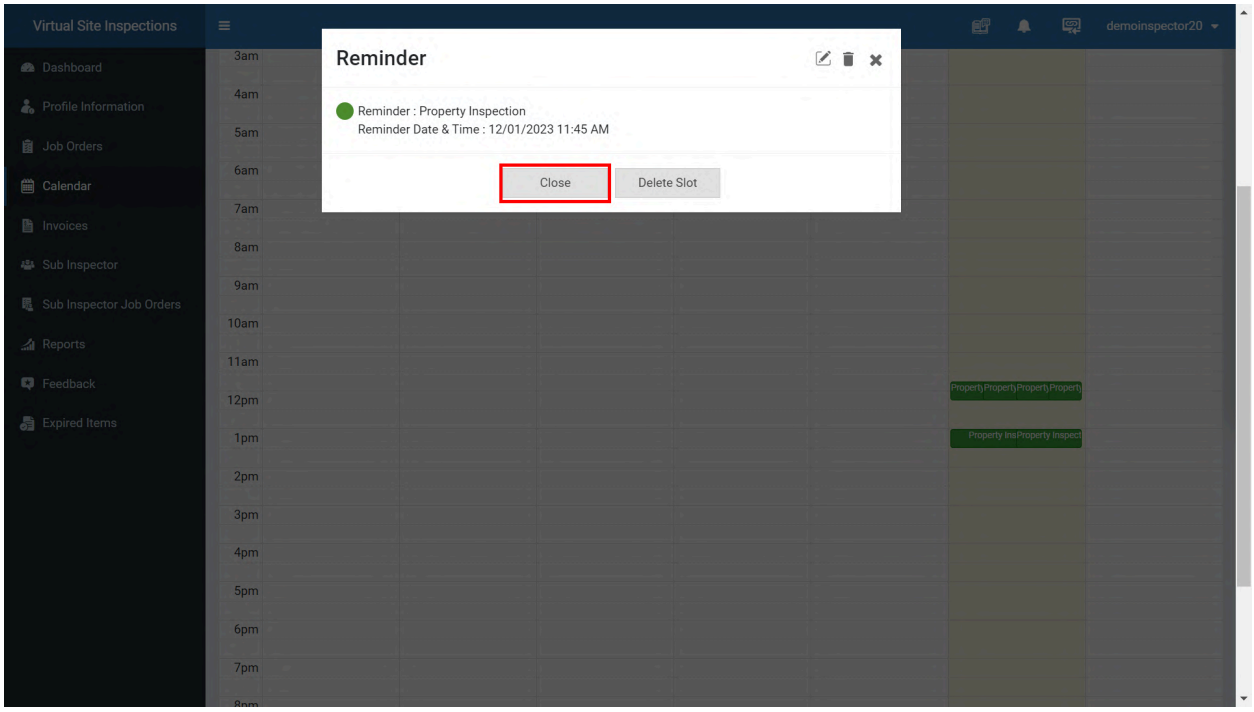
After clicking the "OK" button, a side model will open for adding a reminder. This model includes fields for Reminder Text, Date Modified, and Time. After filling in these fields, click on the "Submit" button to create a reminder for that date, as illustrated in the provided screenshot.



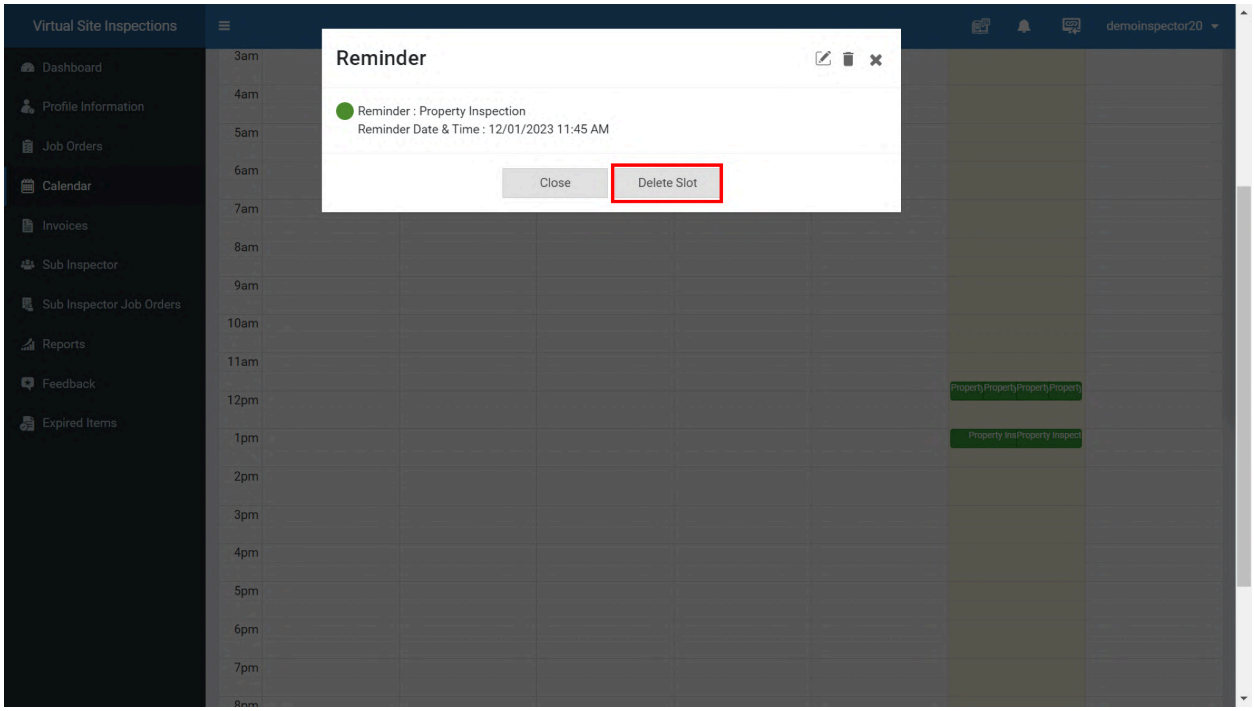
In the below screenshot, you can observe the reminder events scheduled for the respective date.



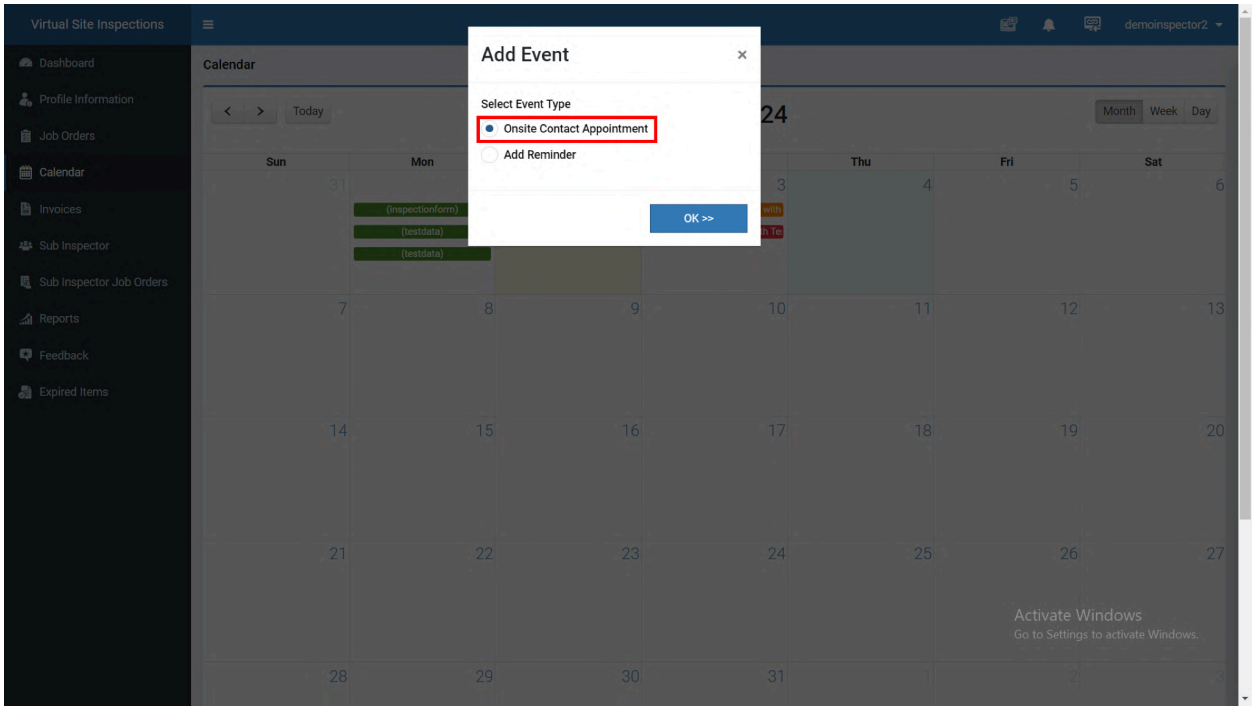
Clicking on the reminder text will open a pop-up displaying brief details, as shown in the screenshot below. The pop-up includes a "Close" button; clicking on it will close the pop-up.



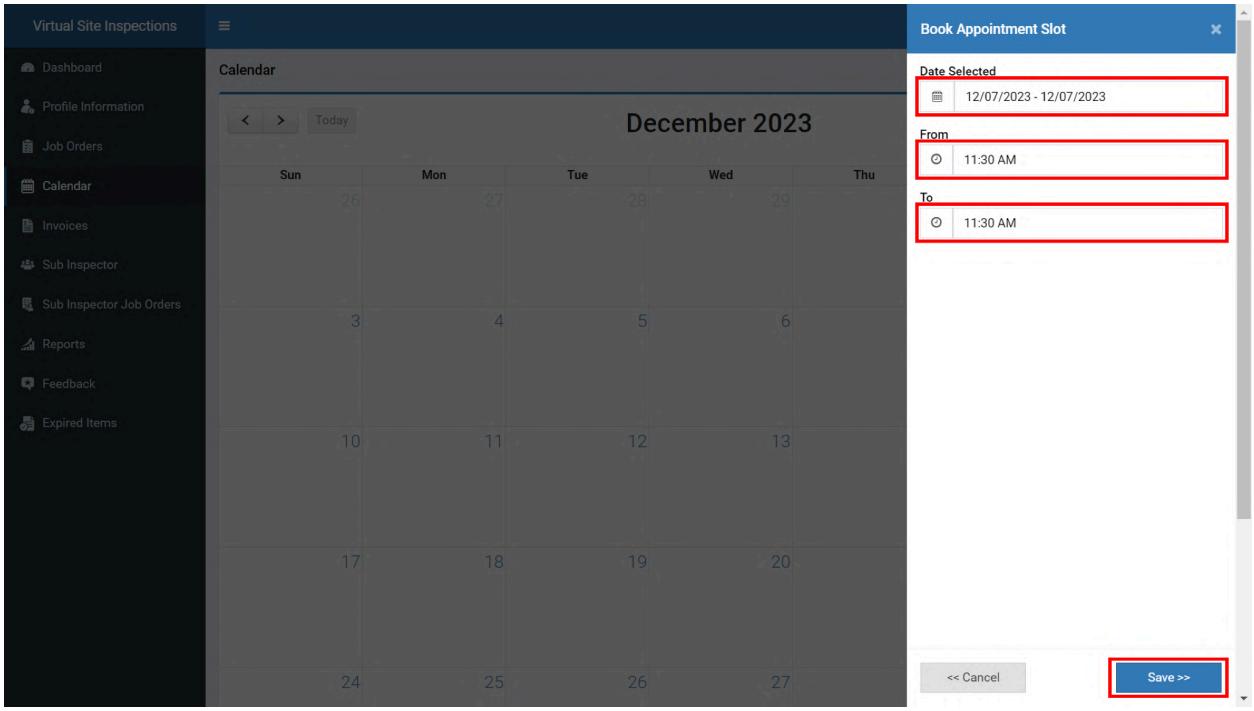
Within the Reminder pop-up, there is an additional button labeled "Delete Slot." Clicking on this button will close the pop-up, and the reminder event will be deleted.



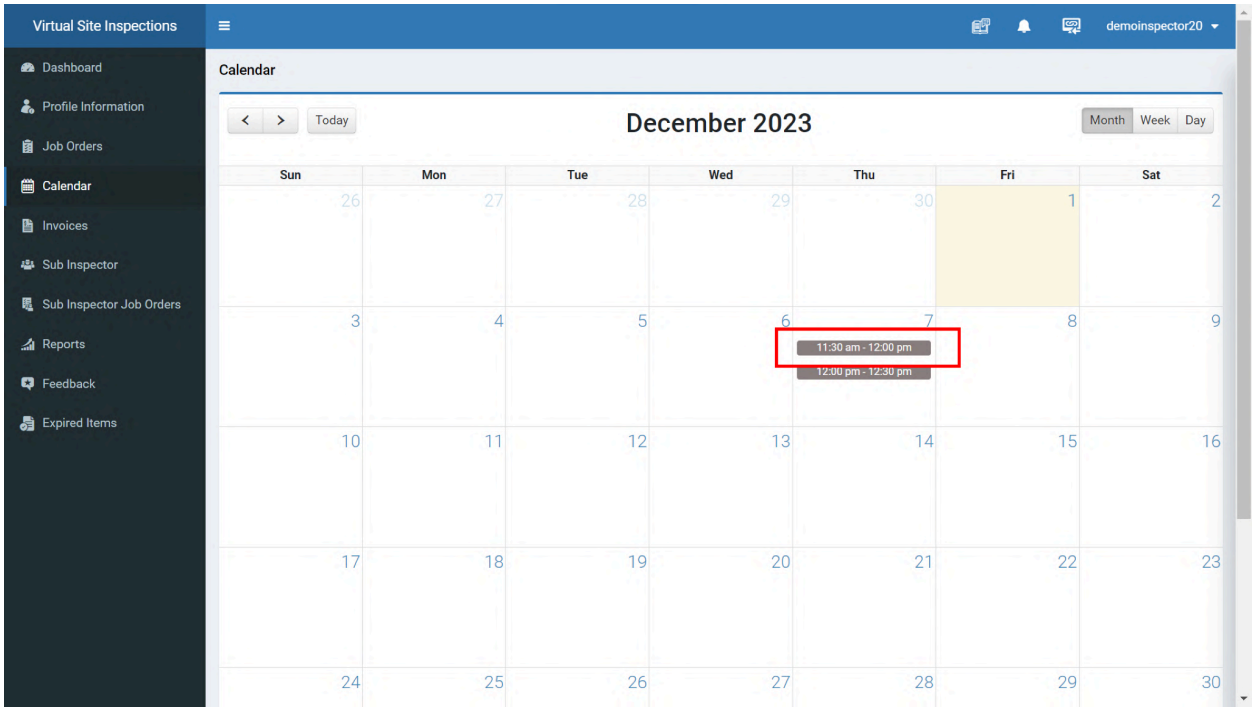
The inspector can add a book appointment slot in the calendar by clicking on a specific date. Upon selecting the date, a dialog box will open, prompting the inspector to choose the "Onsite Contact Appointment" radio button. After making this selection, the inspector can proceed by clicking on the "OK" button to confirm the appointment.



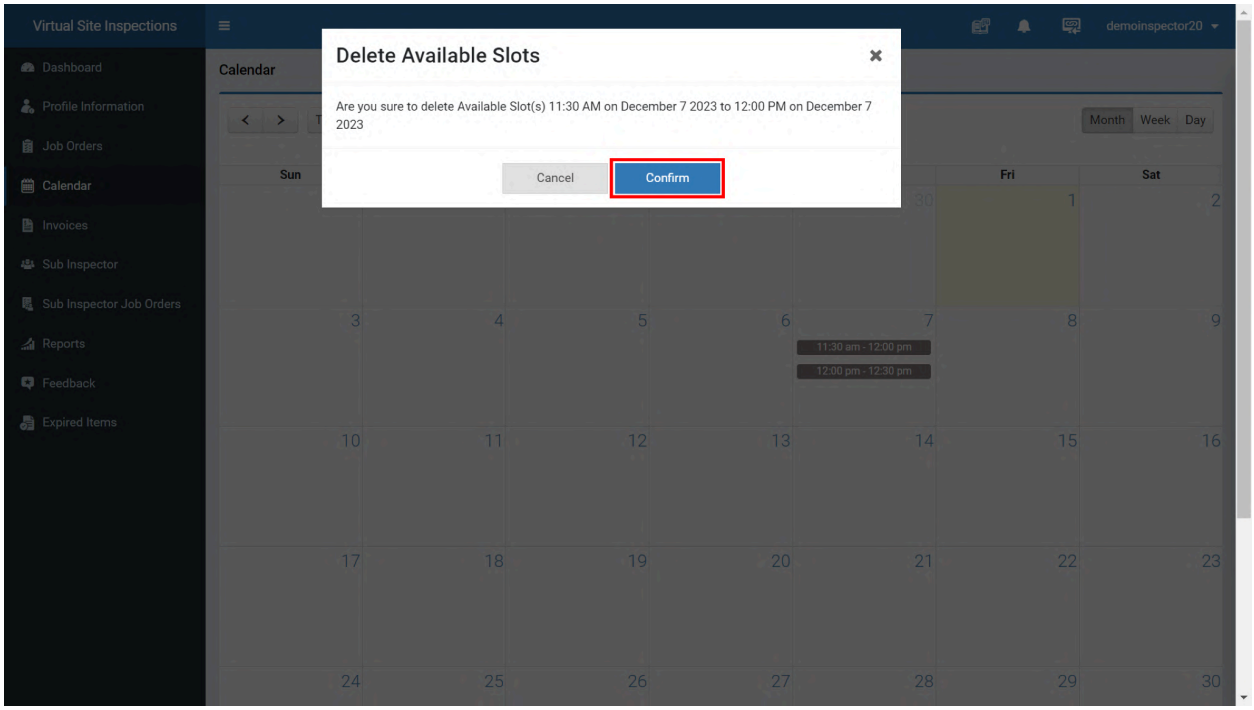
After clicking the "OK" button, a side modal for booking appointments will open. This modal allows the inspector to input information for the selected date, including the starting and ending times for the appointment slot. Once all the necessary information is filled out, the inspector can click on the "Save" button. Subsequently, the 30 minutes slots will be added to the calendar, and the dialog box will close.



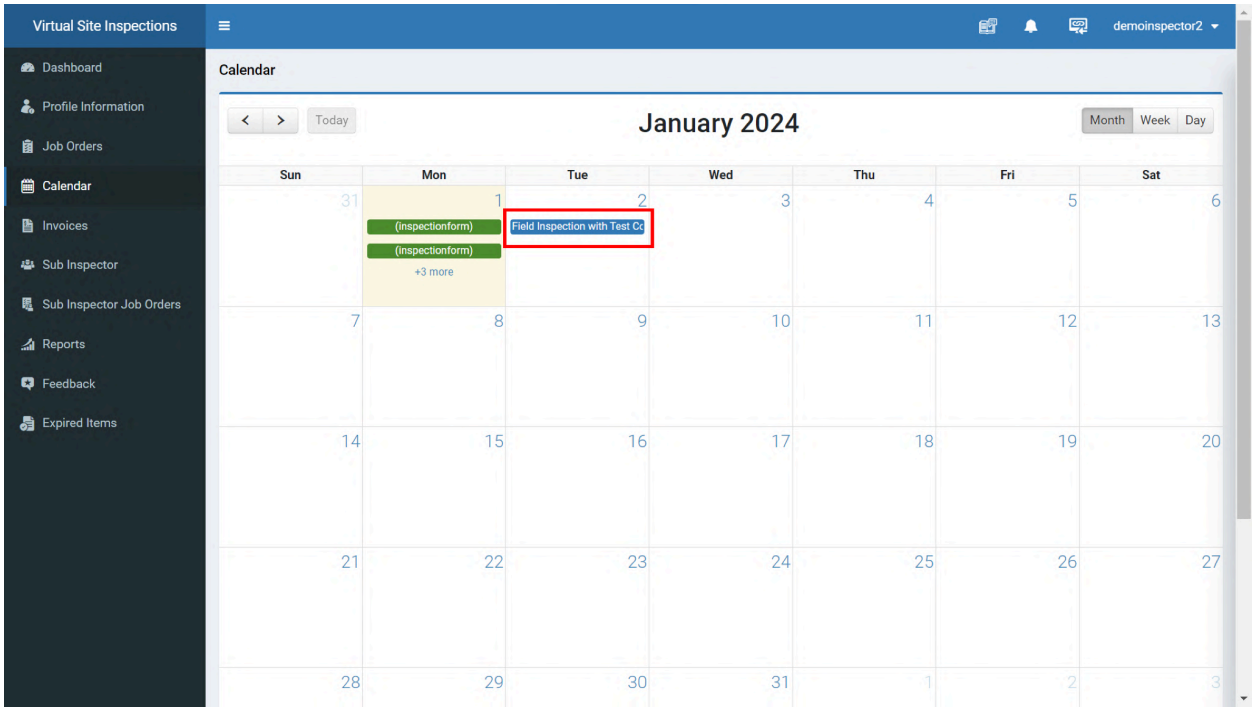
In the calendar, there is an option to delete a slot.



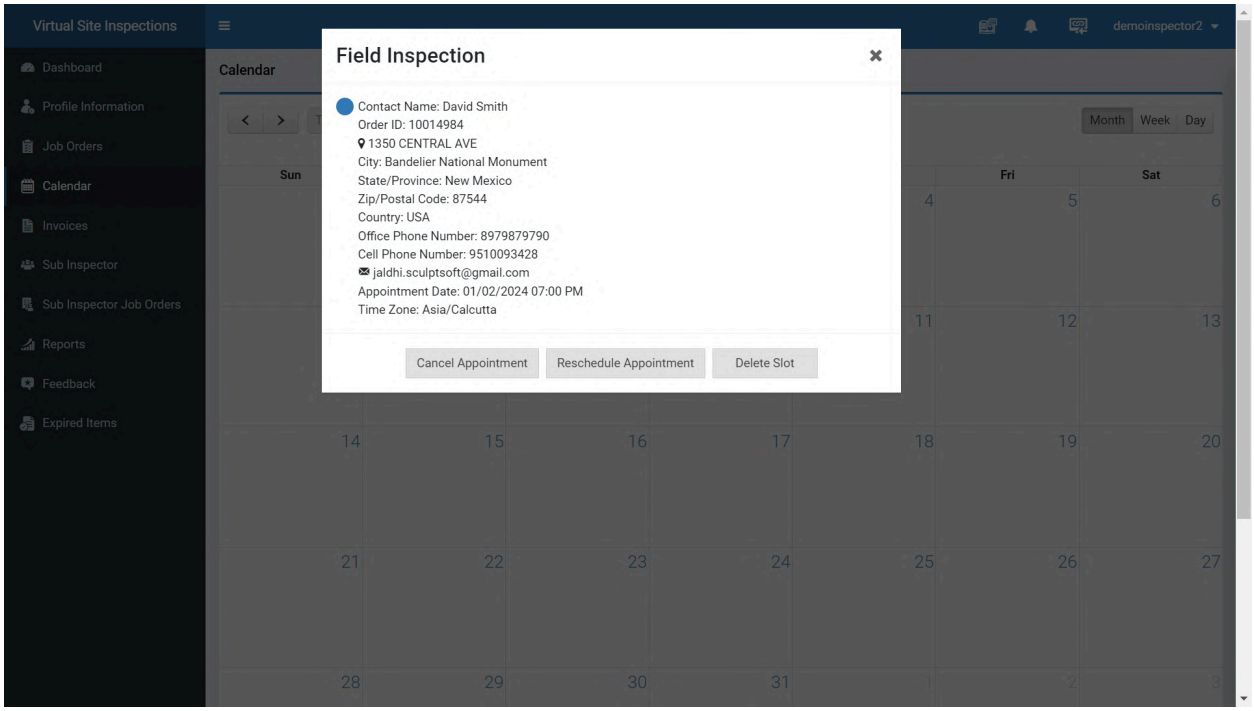
To delete a slot, click on the desired slot in the calendar. This action will open a dialog with "Confirm" and "Cancel" buttons. If you click on the "Confirm" button, the slot will be deleted. However, if you click on the "Cancel" button, no action will be performed.



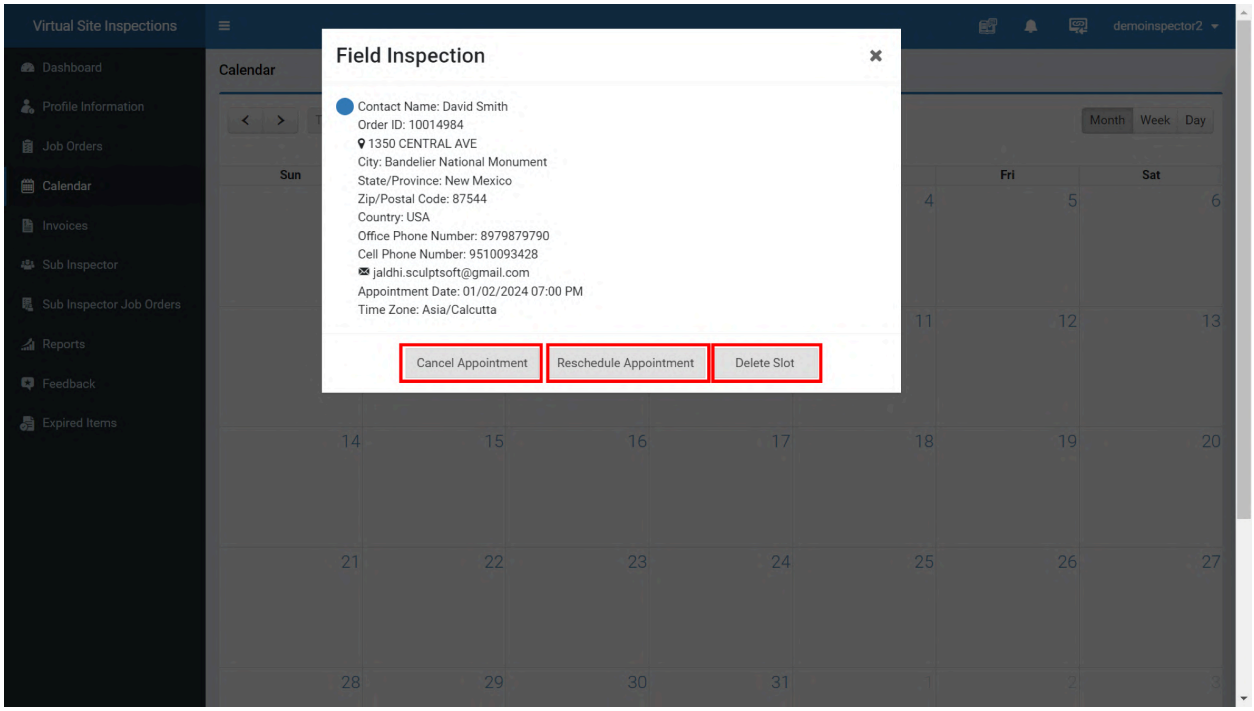
Inspectors can view Onsite Contact's Appointments, classified into three types: confirmed, rescheduled, and cancelled appointments, as well as completed appointments, each assigned to their respective slots. In the provided screenshot, booked appointments are displayed, with confirmed appointments highlighted in blue for easy identification in the specific slot.



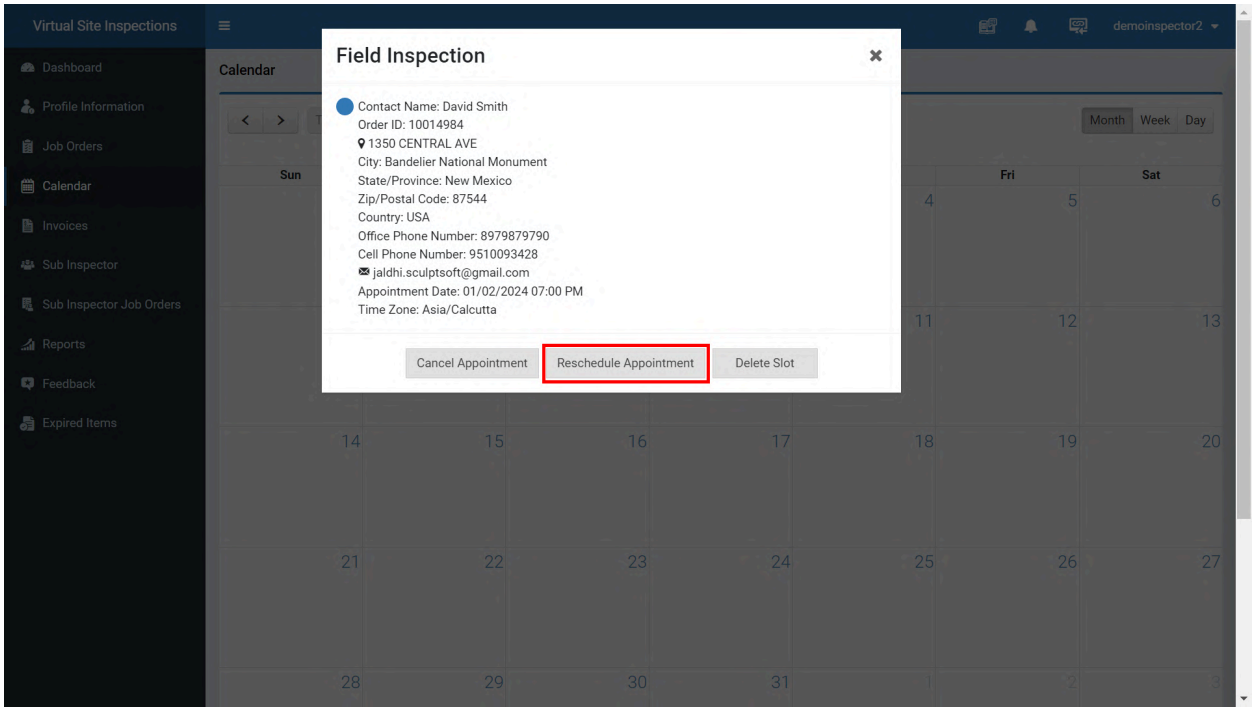
We can also see the details of a confirmed appointment. Clicking on it will open a pop-up dialog displaying all the information about that appointment.If we click on the "x" button, the dialog will close.



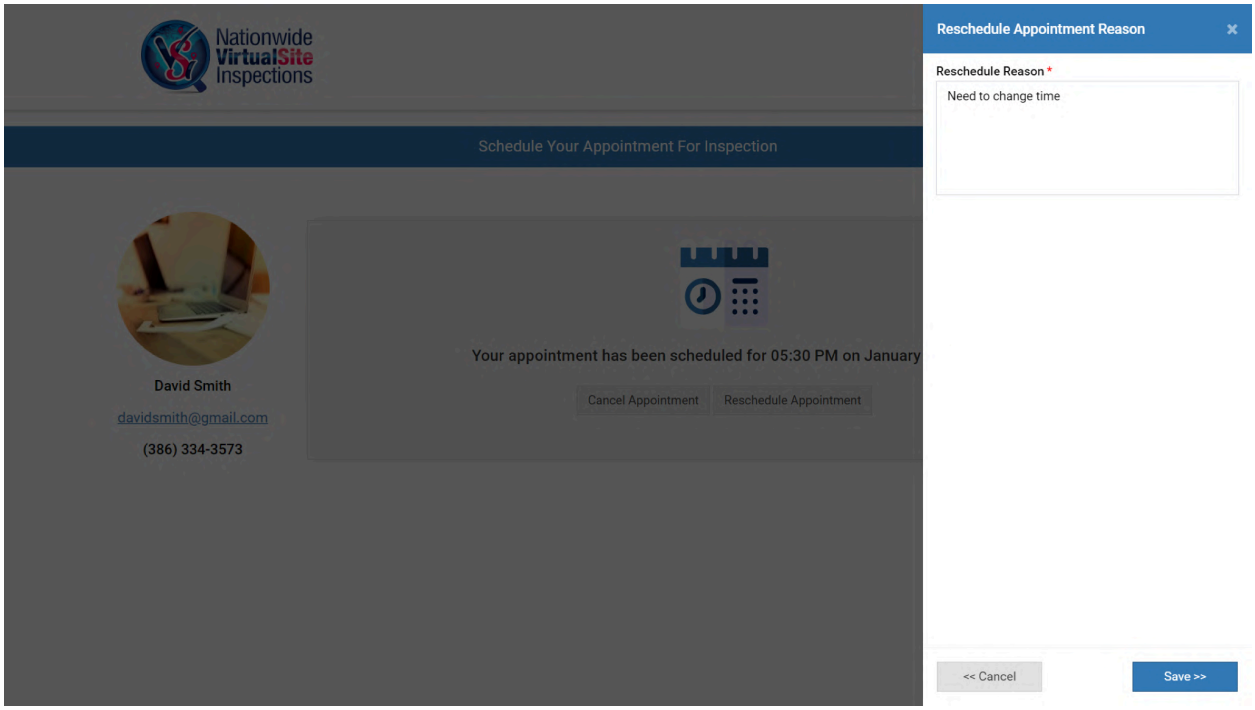
The inspector has the options to reschedule appointments, cancel appointments, and delete time slots as part of their administrative functions.



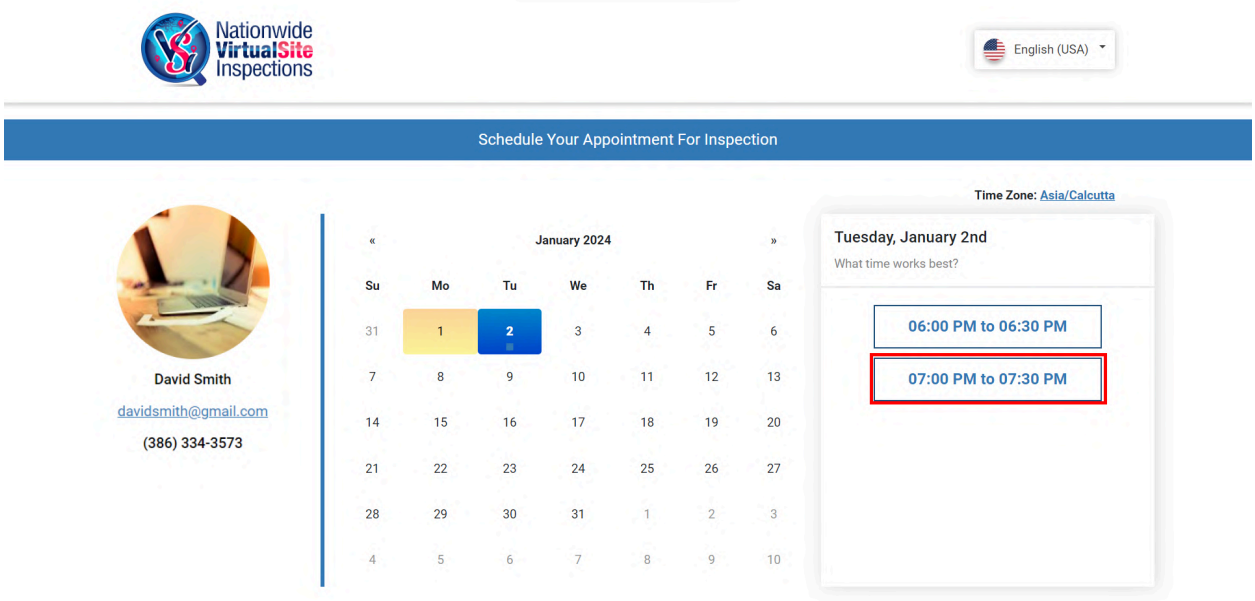
To reschedule an appointment, the inspector should click on the "Reschedule Appointment" button, highlighted in the screen below.



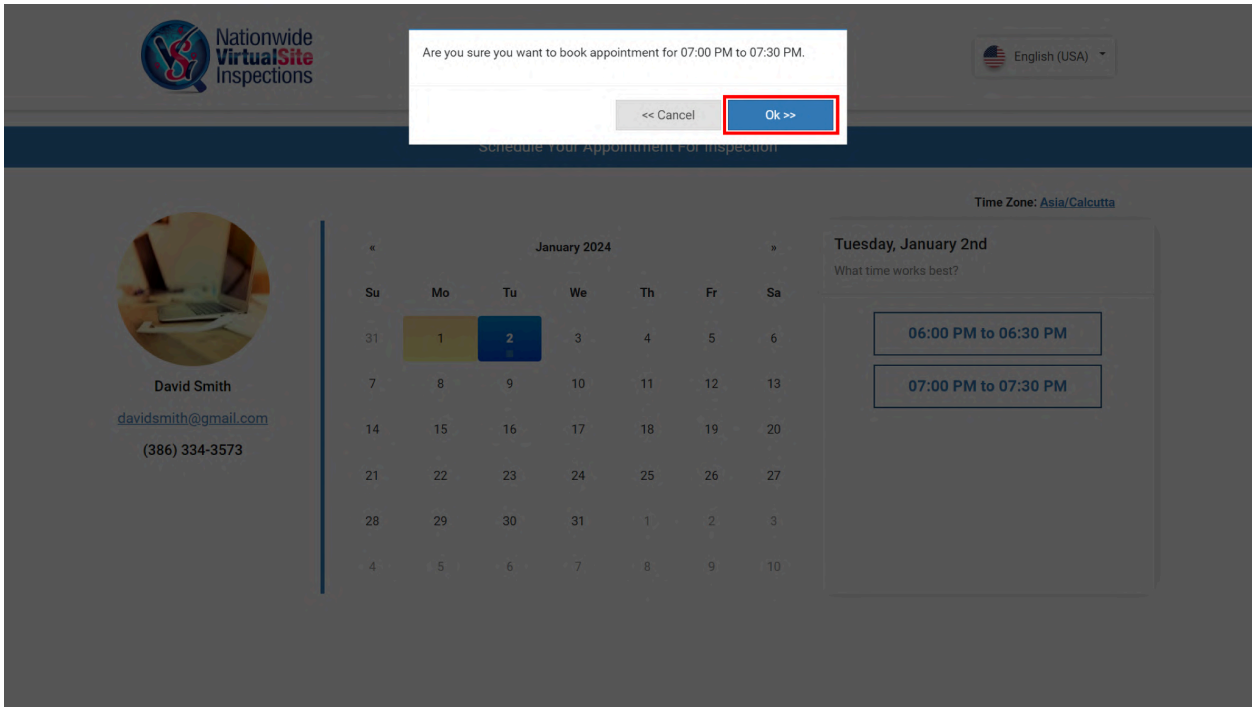
Clicking on the "Reschedule Appointment" button will redirect to a new window, automatically opening the Reschedule Appointment Reason modal. In this modal, the rescheduled reason should be filled out, and upon clicking the "Save" button, the modal will close.



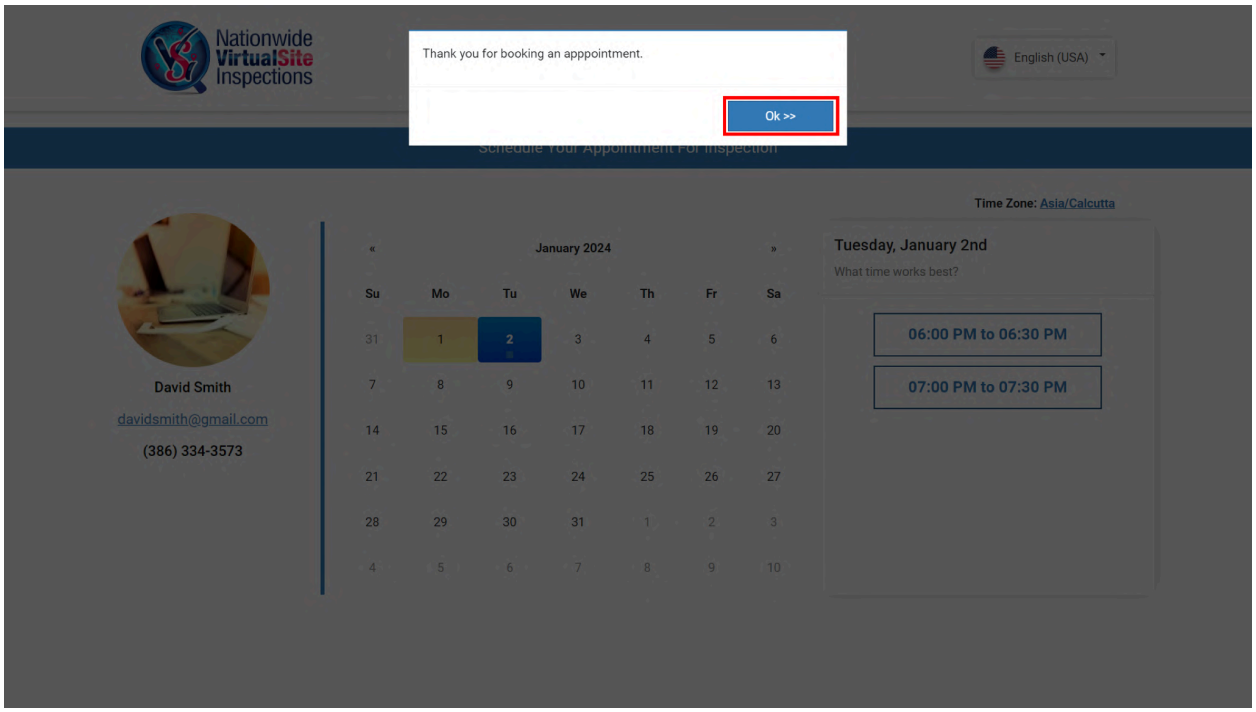
Following that, you can view the time slots on the calendar organized by date.



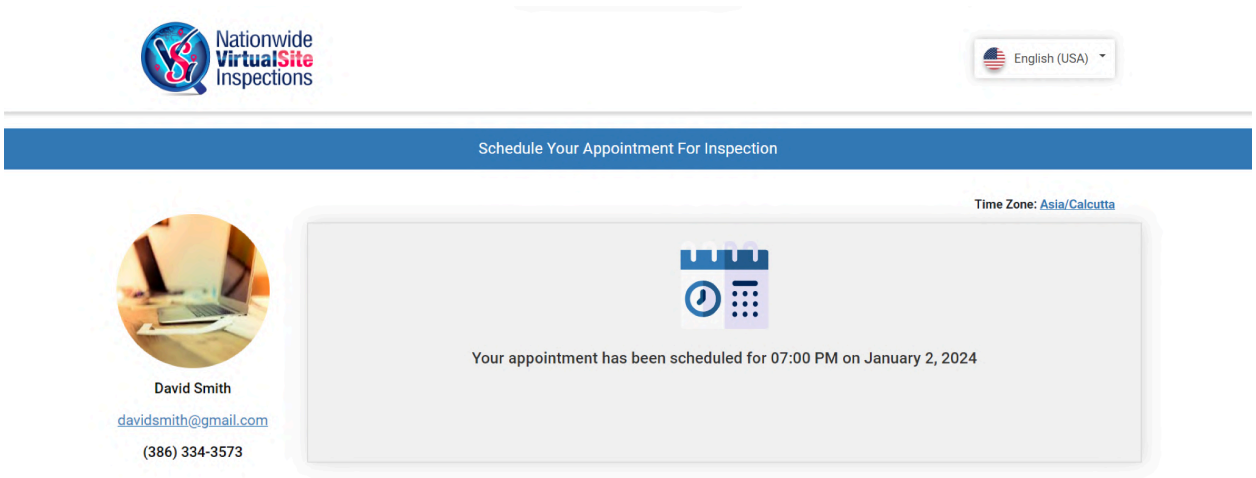
To book an appointment, select the desired time slot, and a pop-up dialog for confirmation will appear. Click on the "OK" button, and the appointment will be successfully rescheduled.



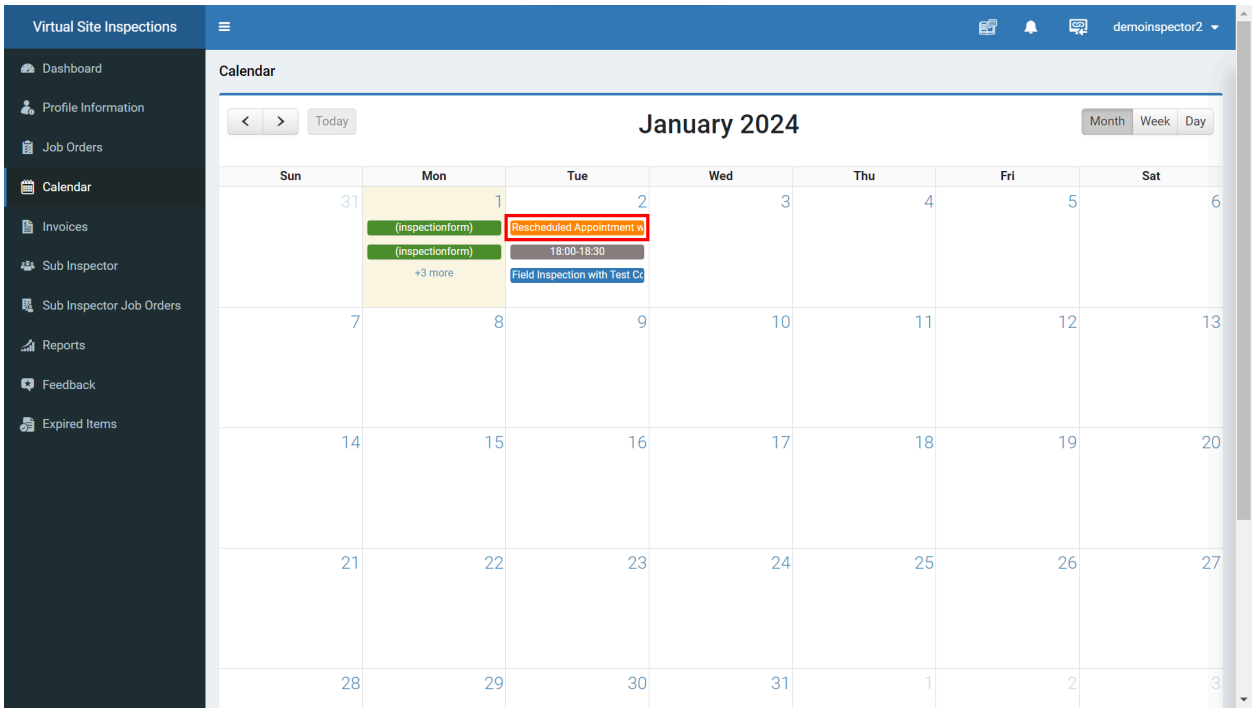
After clicking on the "OK" button, another dialog will appear to express gratitude for booking the appointment.



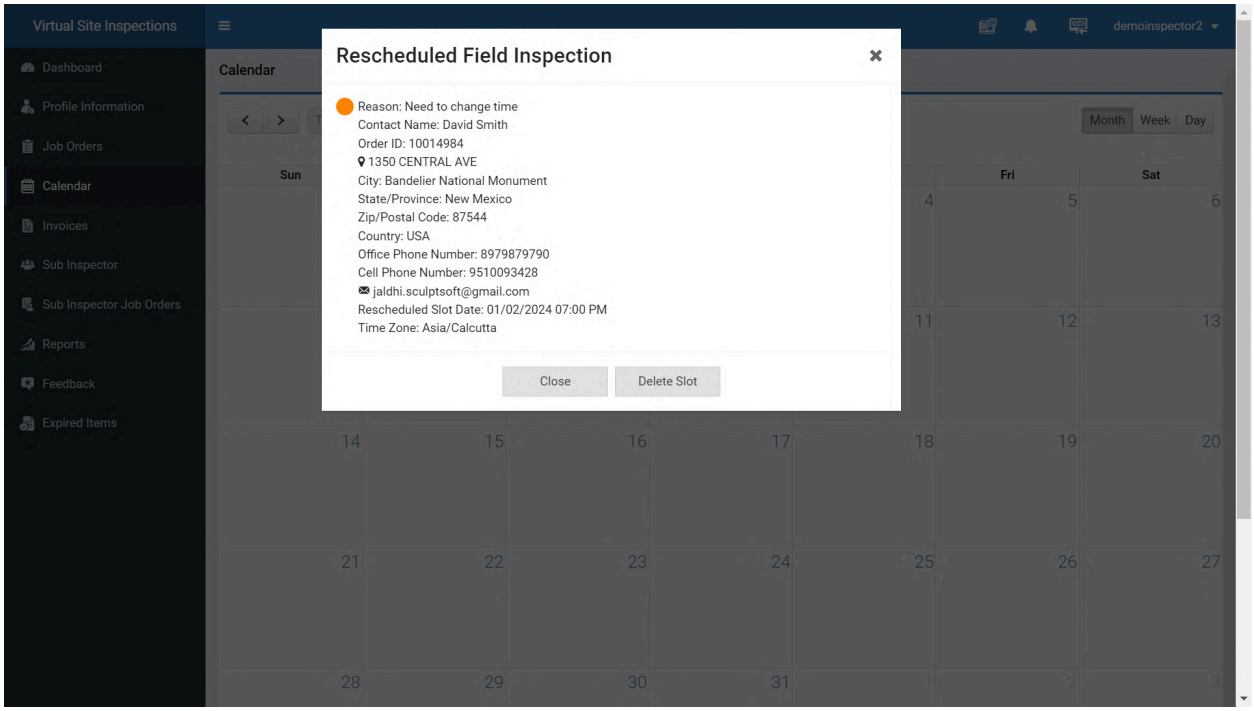
In this dialog, click on the "OK" button to close it, and the rescheduled appointment details will be displayed on the page.



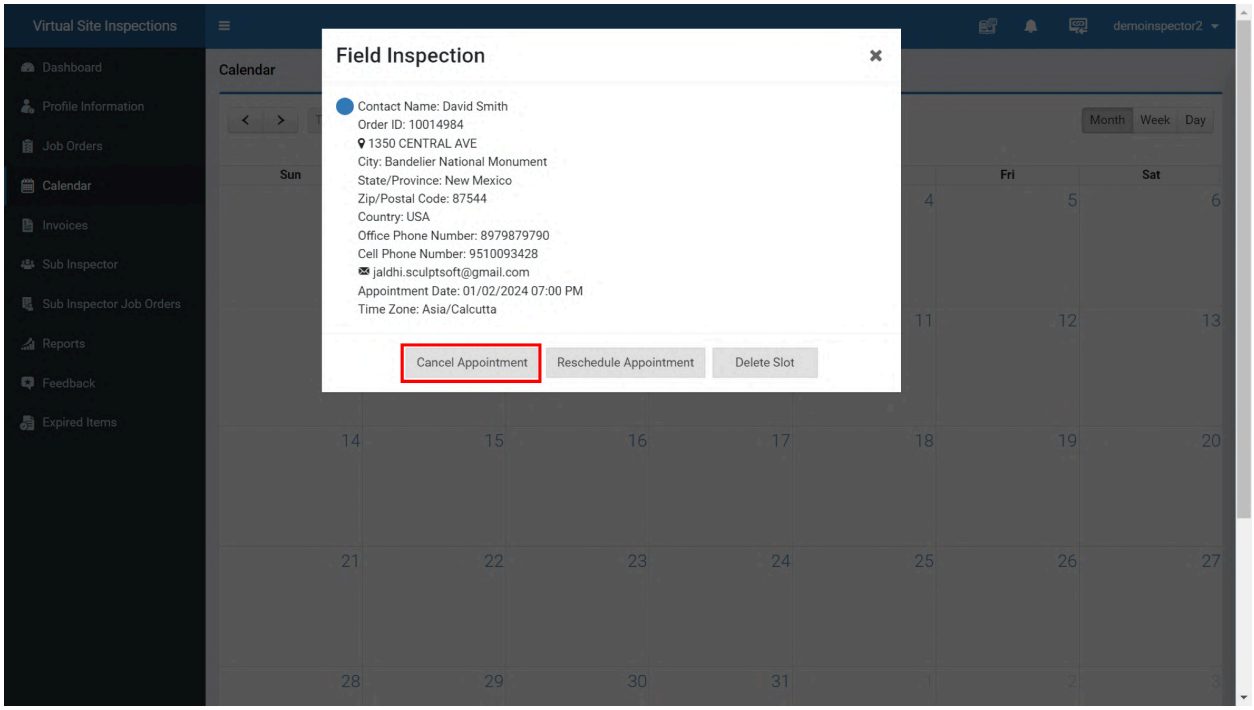
Here, you can observe the rescheduled appointments in the screenshot below. They are indicated in yellow color for the respective slots.



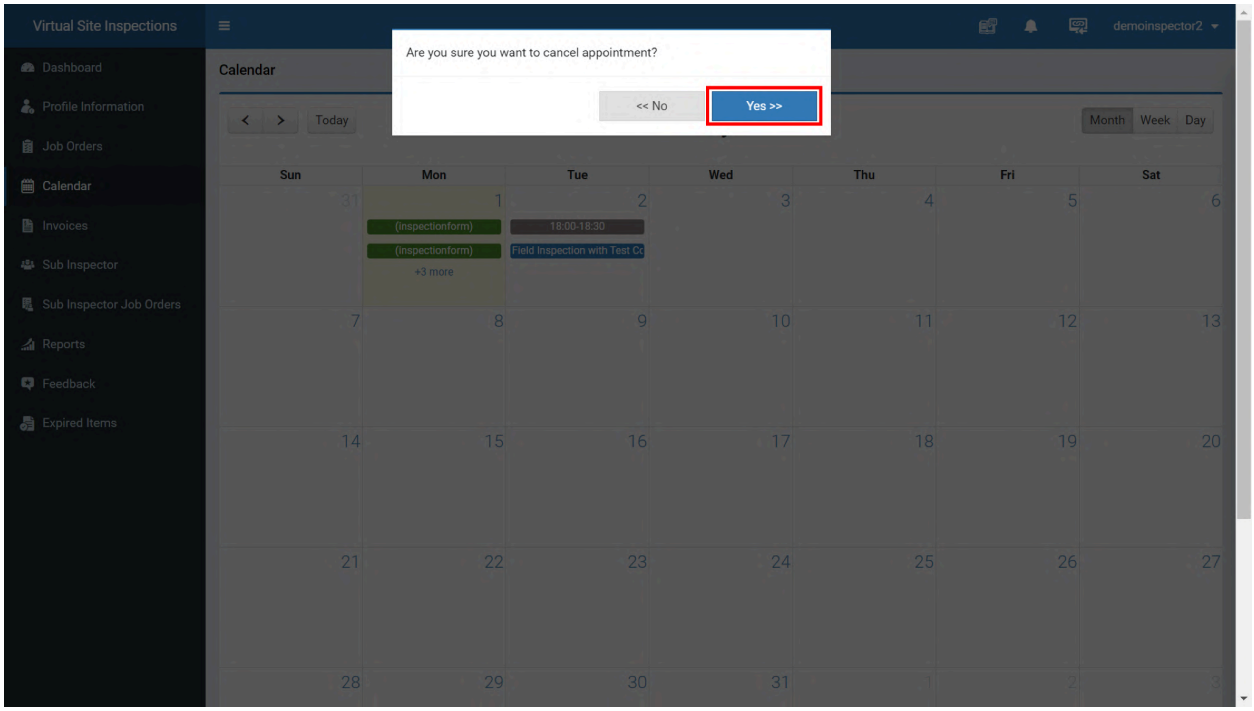
We can also view the details of a rescheduled appointment. Clicking on it will open a pop-up dialog displaying all the information about that appointment. If we click on the "Close" button, the dialog will close.



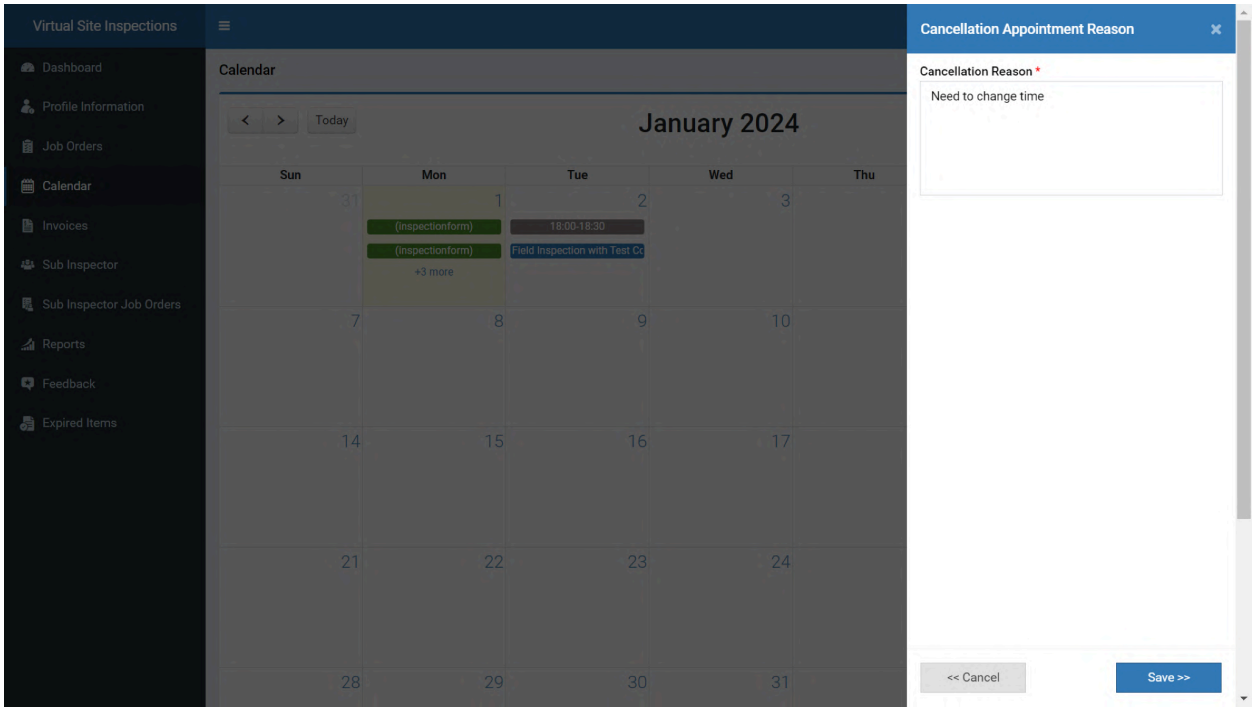
To cancel an appointment, the inspector should click on the "Cancel Appointment" button as indicated in the dialog box.



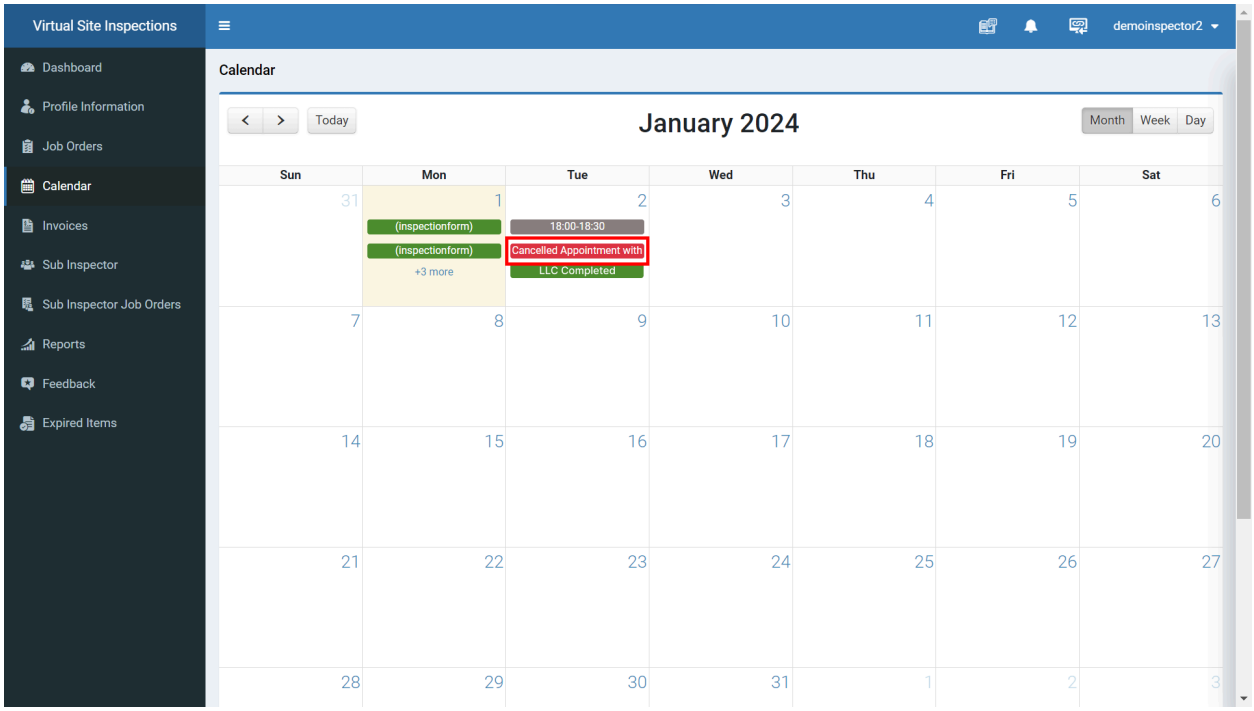
Clicking on the "Cancel Appointment" button will open a cancellation confirmation dialog. Click on the "Yes" button to proceed with the cancellation process. If you click on the "No" button, no further action will be performed.



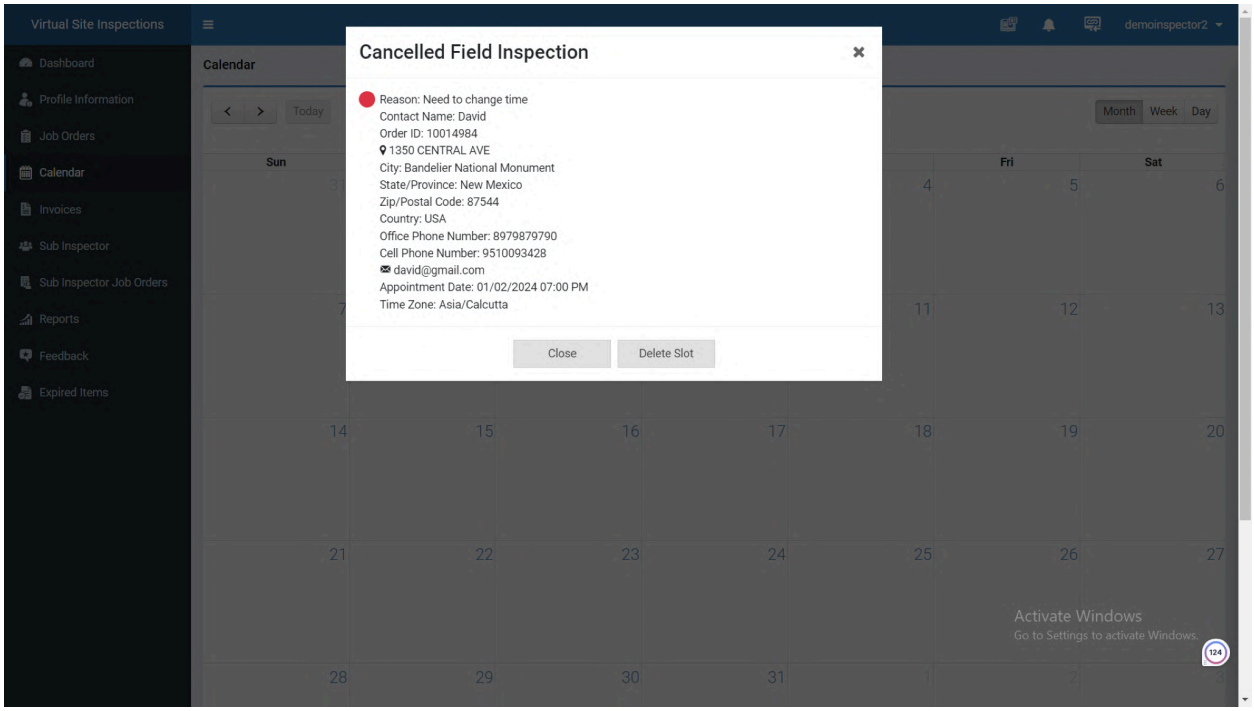
After clicking on the "Yes" button, a side modal will open for adding the cancellation reason. In this modal, enter the cancel appointment reason, then click on the "Save" button. The dialog will close, and the appointment will be cancelled.



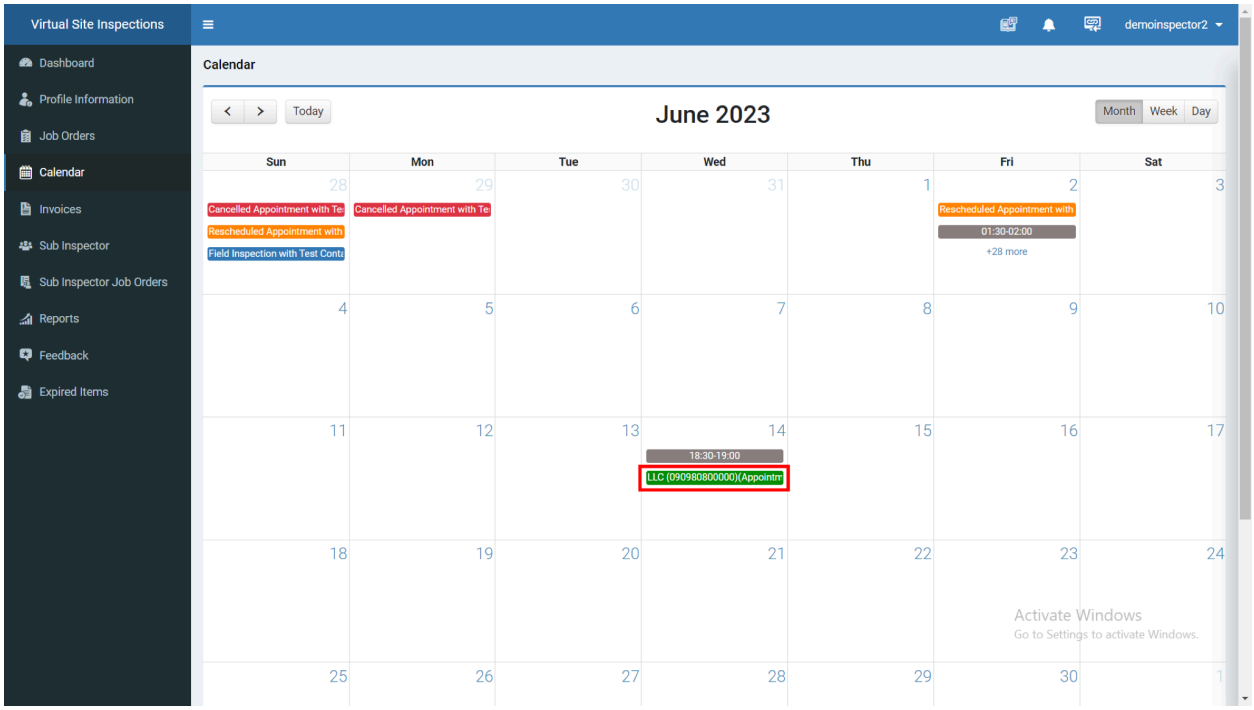
Here, you can observe the cancelled appointments in the screenshot below. They are indicated in red color for the respective slots.



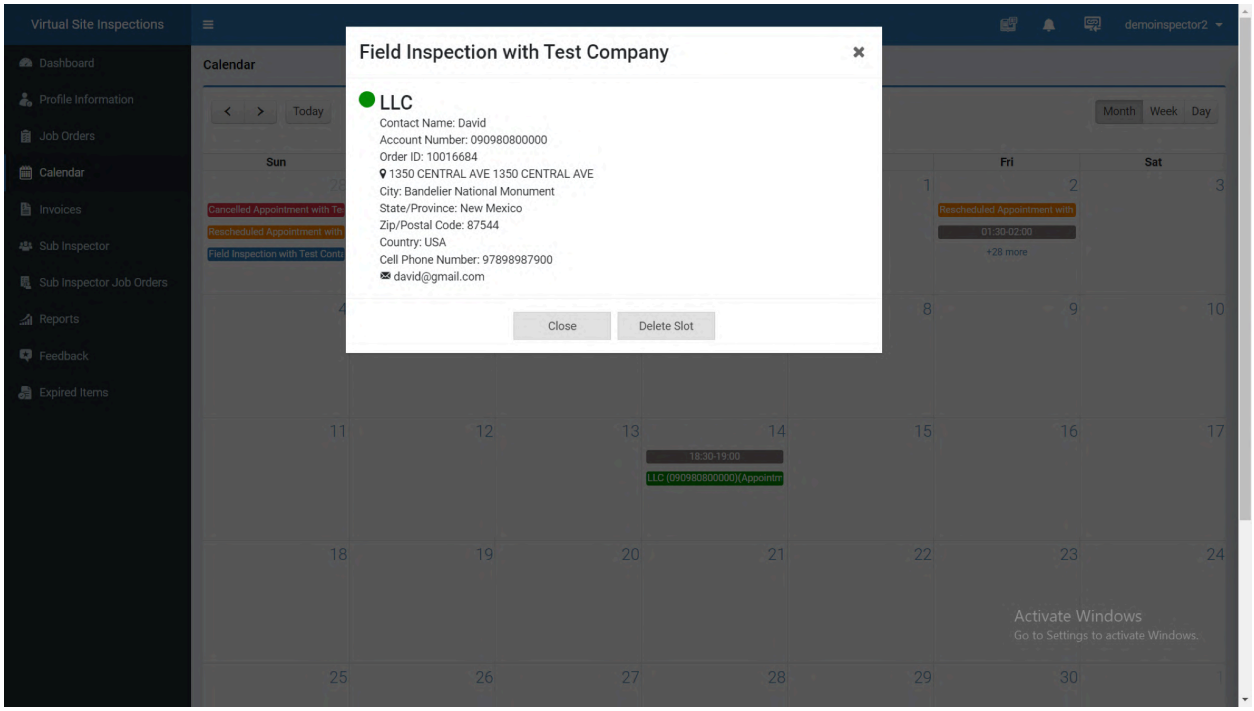
We can also view the details of a cancelled appointment. Clicking on it will open a pop-up dialog displaying all the information about that appointment. If we click on the "Close" button, the dialog will close.



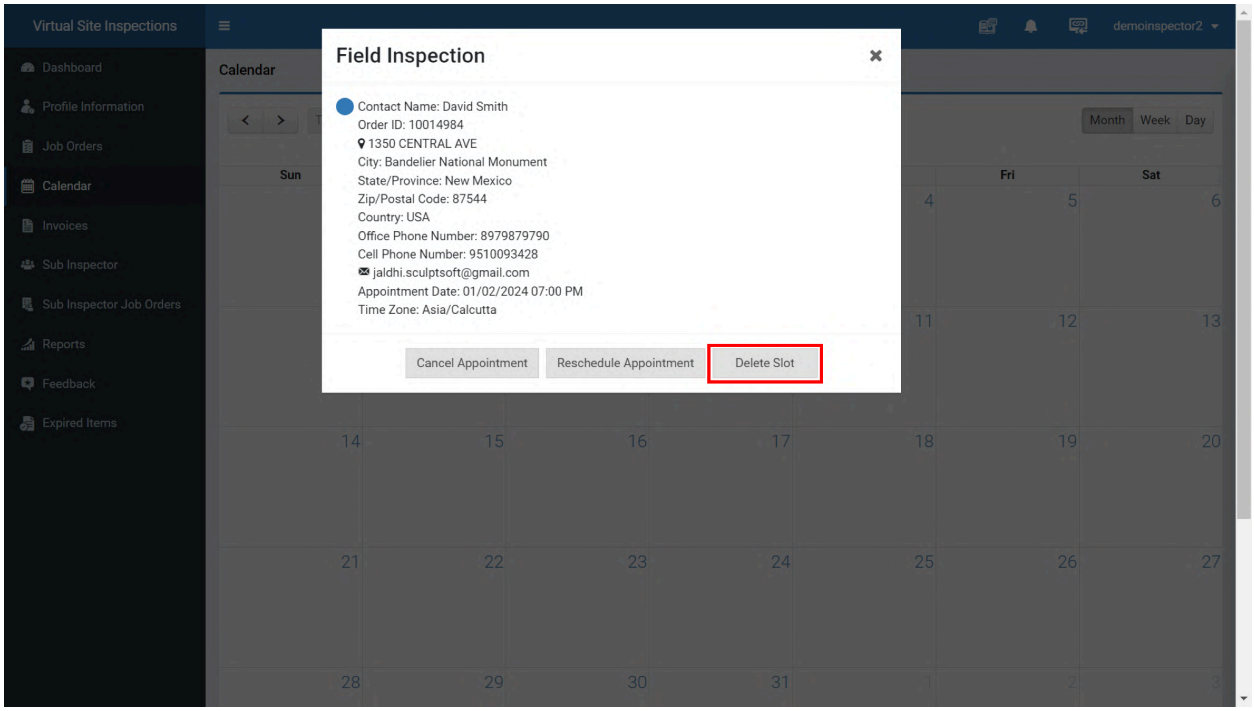
Here, you can observe the completed appointments in the screenshot below. They are indicated in green color for the respective slots.



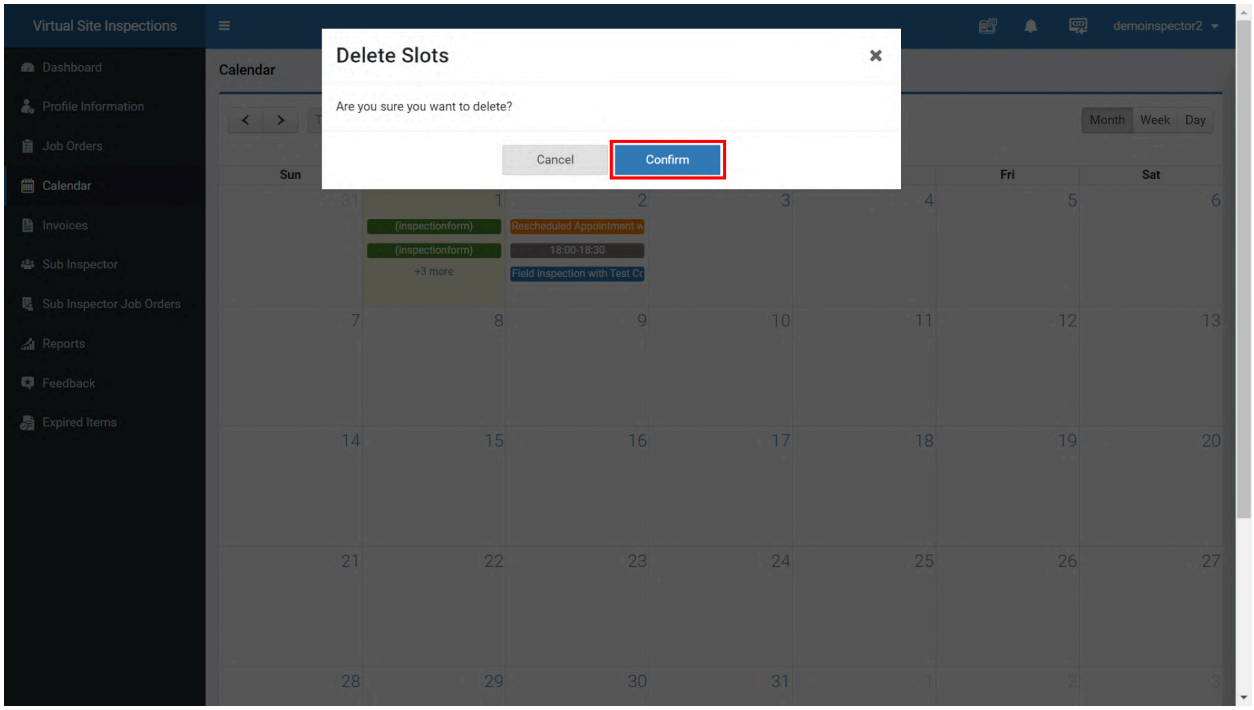
We can also view the details of a completed appointment. Clicking on it will open a pop-up dialog displaying all the information about that appointment. If we click on the "Close" button, the dialog will close.



The inspector has the ability to delete a slot by clicking on the "Delete Slot" button, as highlighted in the screenshot.



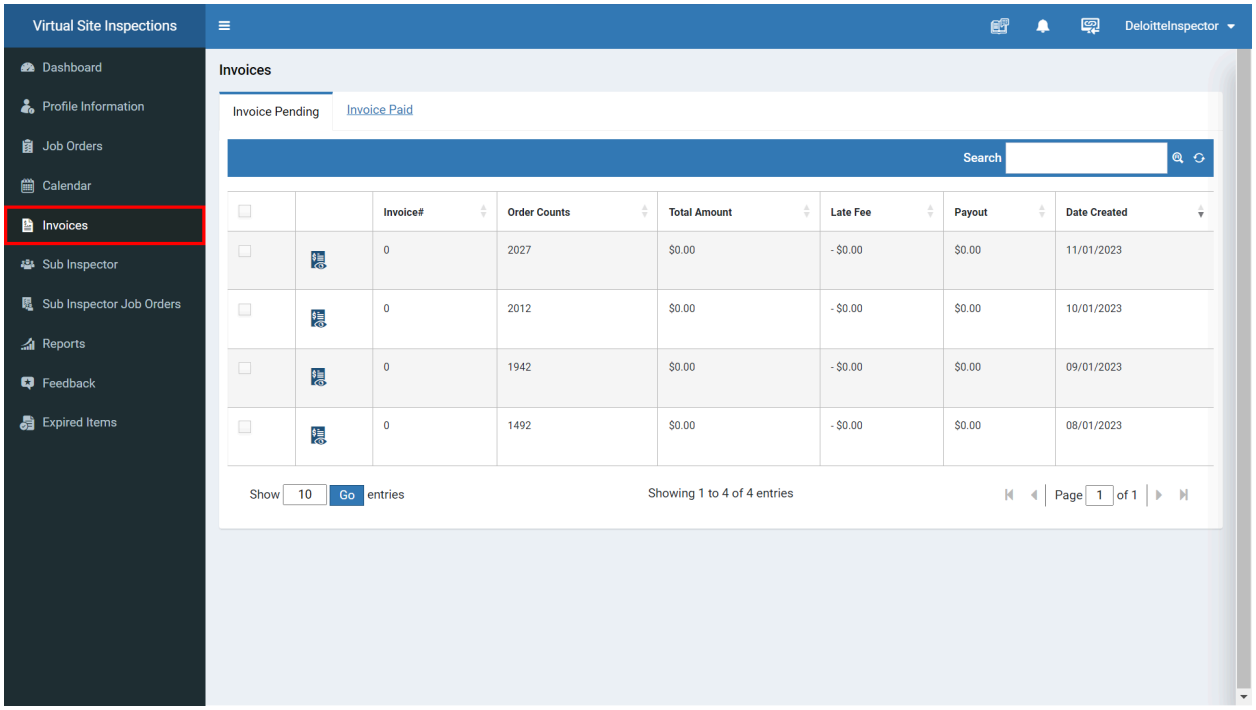
After clicking on the "Delete Slot" button, a confirmation dialog box for deleting the slot will appear. In this dialog, clicking on the "Confirm" button will cancel the appointment and close the dialog.



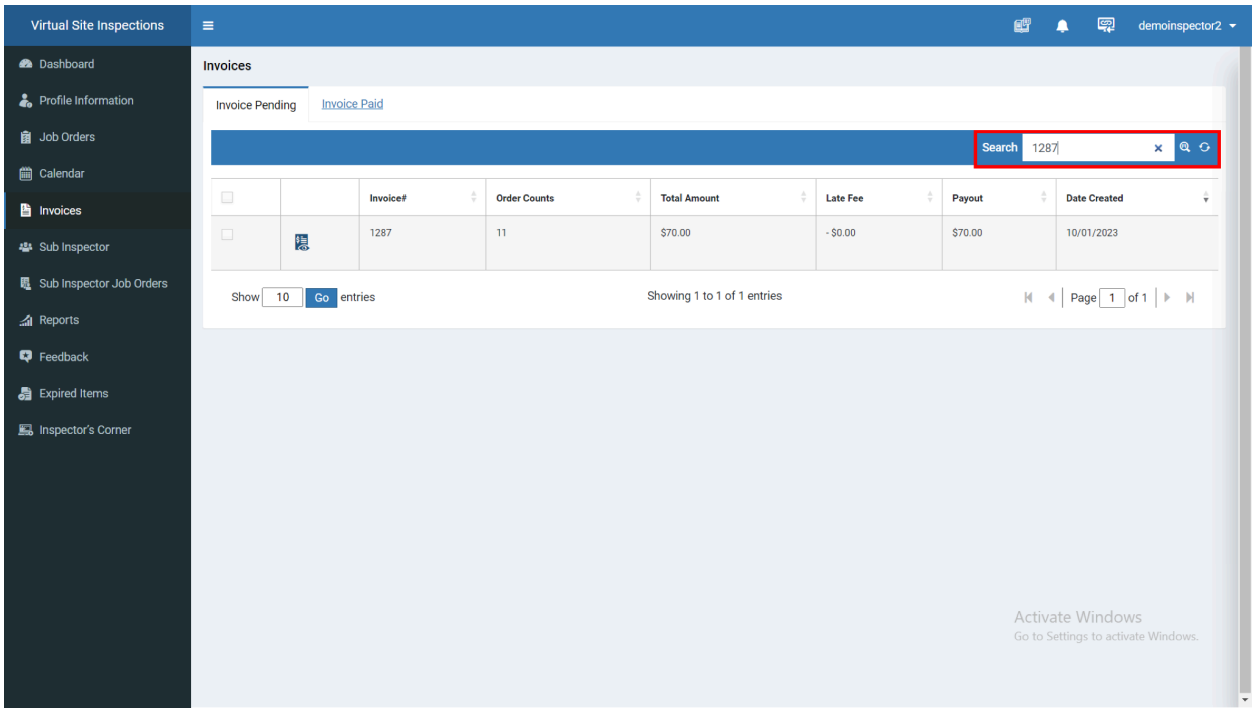
Invoices

The Inspector can access their invoice details by selecting the 'Invoice' menu in the left-side panel, directing them to the Invoice page. Furthermore, they have the ability to download the invoice.

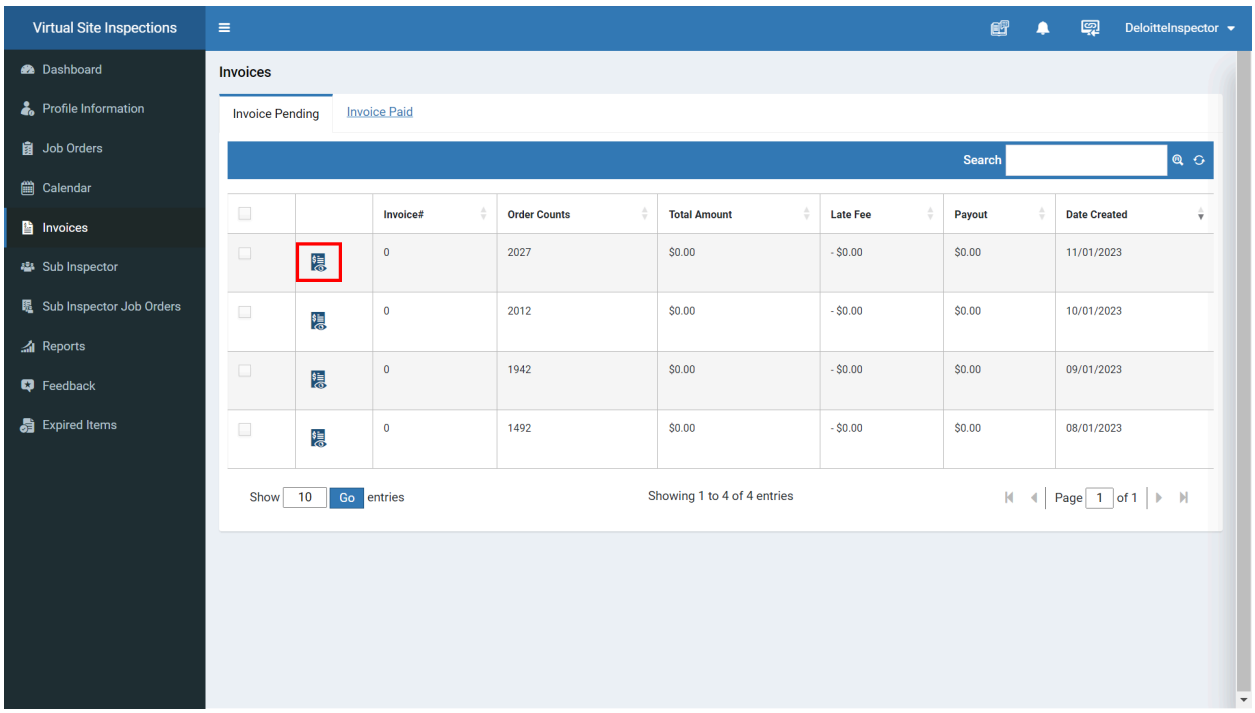
The Invoices page is organized into two tabs: "Invoice Pending" and "Invoice Paid". Within the "Invoice Pending" tab, a comprehensive list of unpaid invoices is displayed. Each entry in the list is accompanied by a preview icon, enabling users to inspect the details of a specific invoice. The information presented for each entry includes the invoice number, payout details, date of creation, order count, and late fee, as illustrated in the screenshot below.



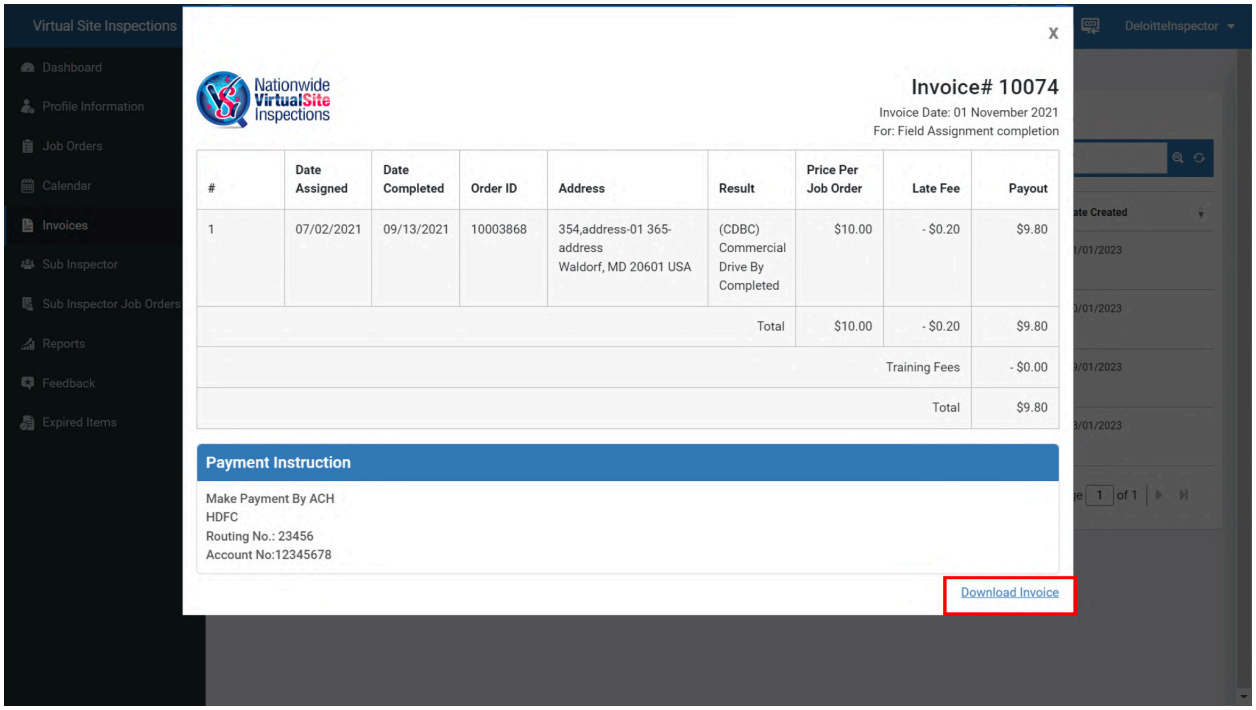
To search for an invoice using a keyword, the system conducts the search specifically based on the invoice number. Enter your search term in the highlighted search field, as depicted in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant invoices corresponding to the specified search criteria.



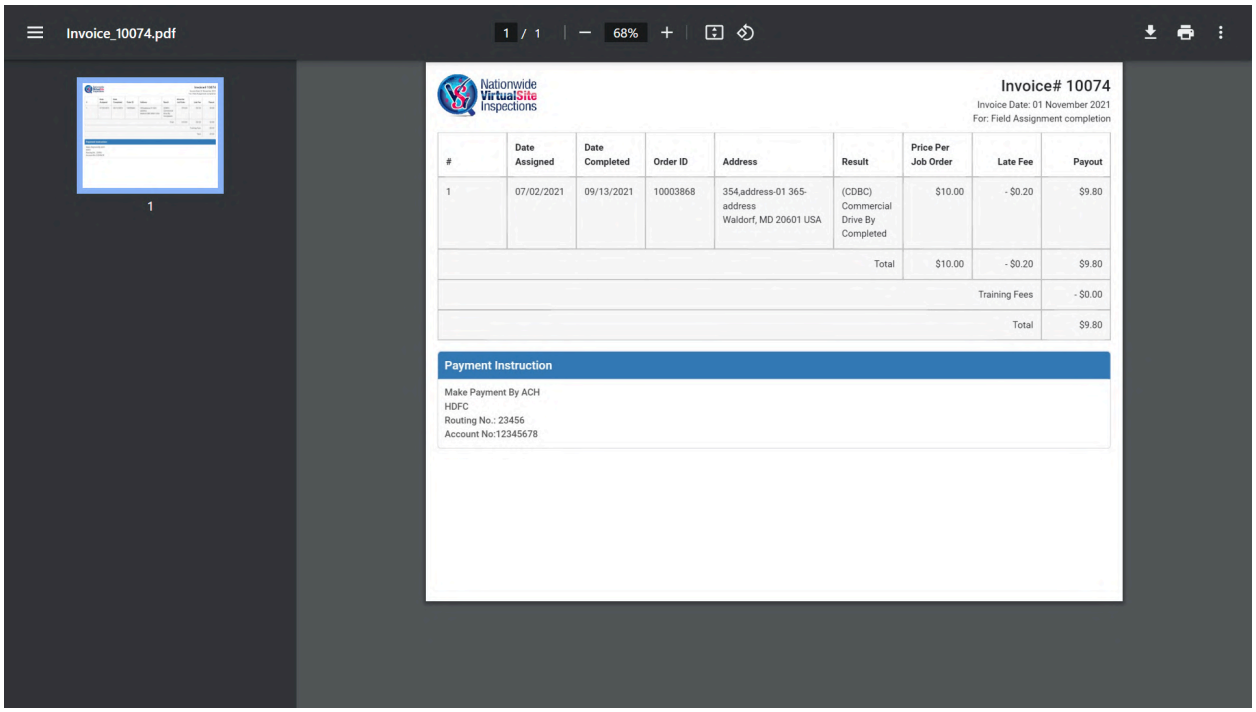
To view the details of an invoice, click on the "Preview Invoice" icon, as demonstrated in the screenshot below.



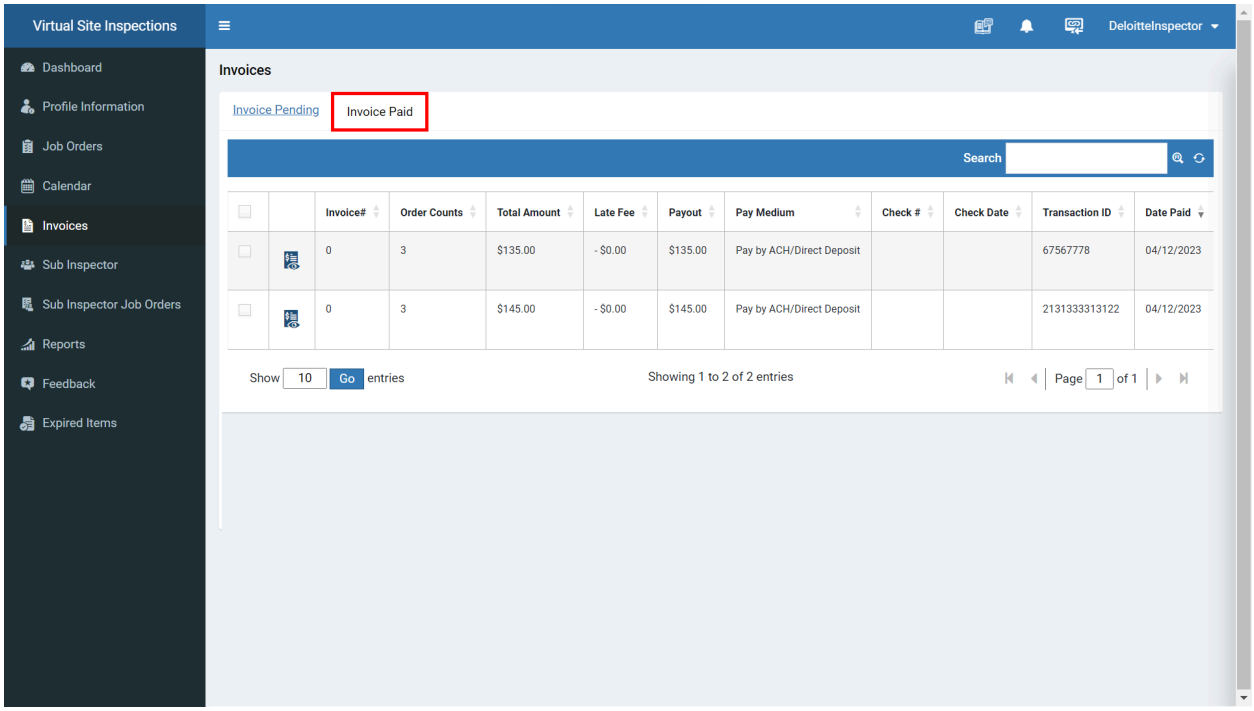
After clicking on the "Preview Invoice" icon, a pop-up will open, allowing you to see detailed information about the invoice. Additionally, you can download the invoice by clicking on the highlighted link "Download Invoice" as shown in the screenshot below.



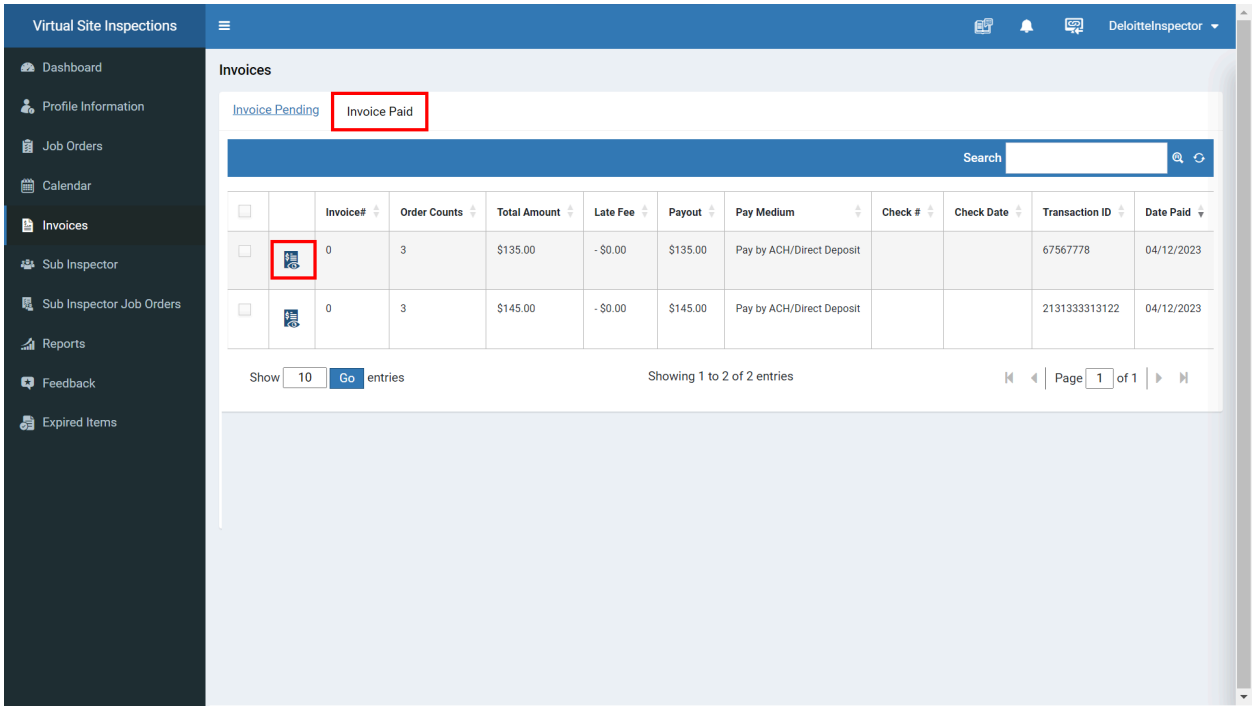
After clicking on the "Download Invoice" link, the invoice PDF file will be downloaded to your system. You can preview the content of the PDF file, as shown in the screenshot provided below.



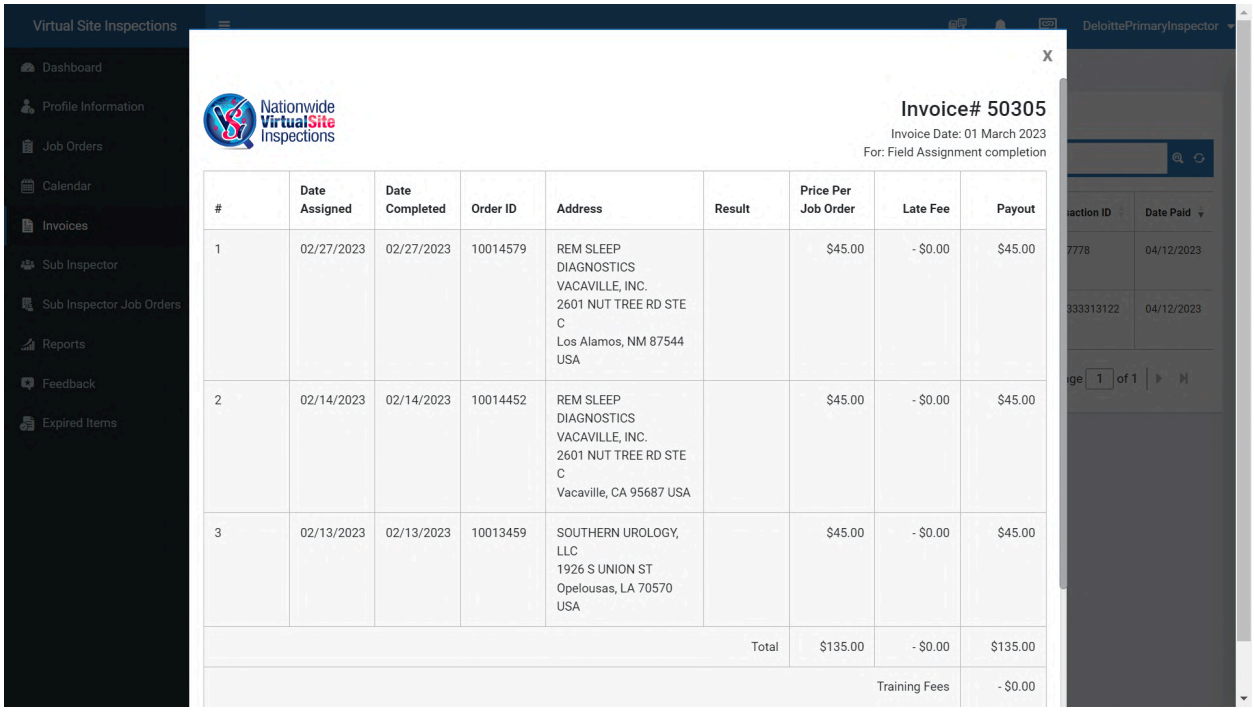
Clicking on the "Invoice Paid" tab, you can access a list of all paid invoices. Each entry in the list includes a preview icon, enabling you to examine the details of a specific invoice. The provided information encompasses the invoice number, order count, total amount, late fee, payout, payment medium, check number, check date, transaction ID, and date paid, as depicted in the picture below.

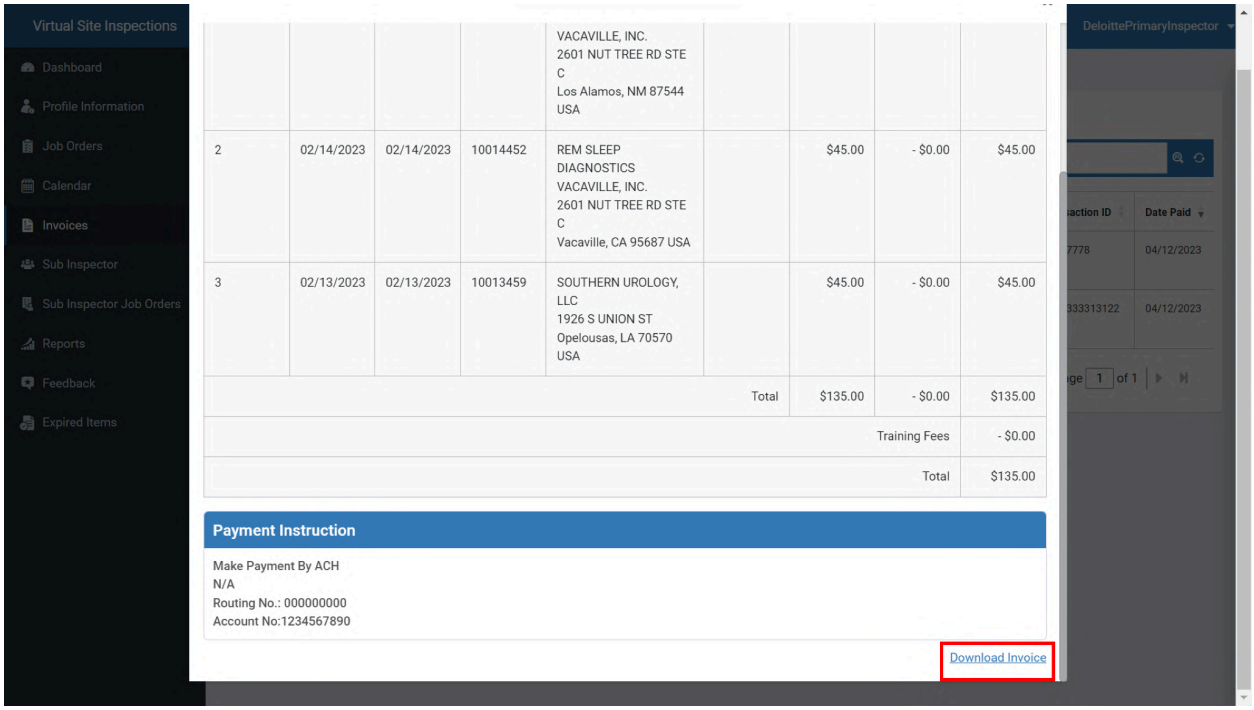


To view the details of an invoice, click on the "Preview Invoice" icon, as demonstrated in the screenshot below.

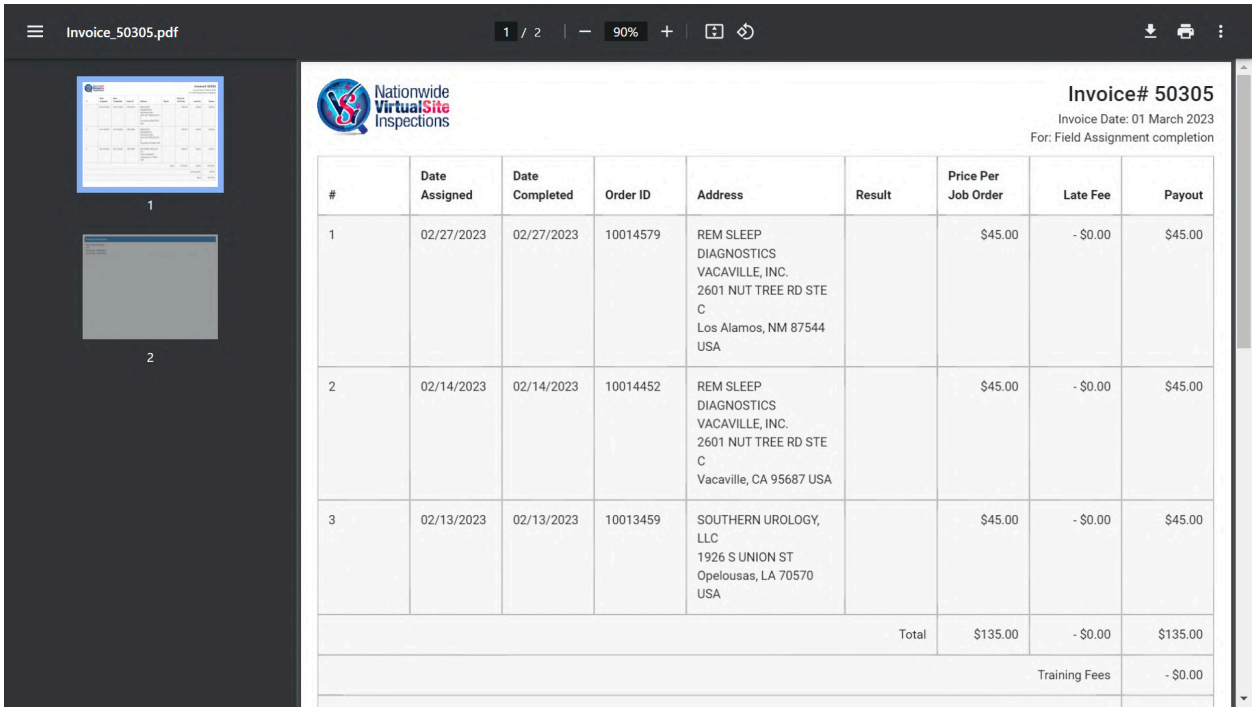


After clicking on the "Preview Invoice" icon, a pop-up will open, allowing you to see detailed information about the invoice. Additionally, you can download the invoice by clicking on the highlighted link "Download Invoice" as shown in the screenshot below.





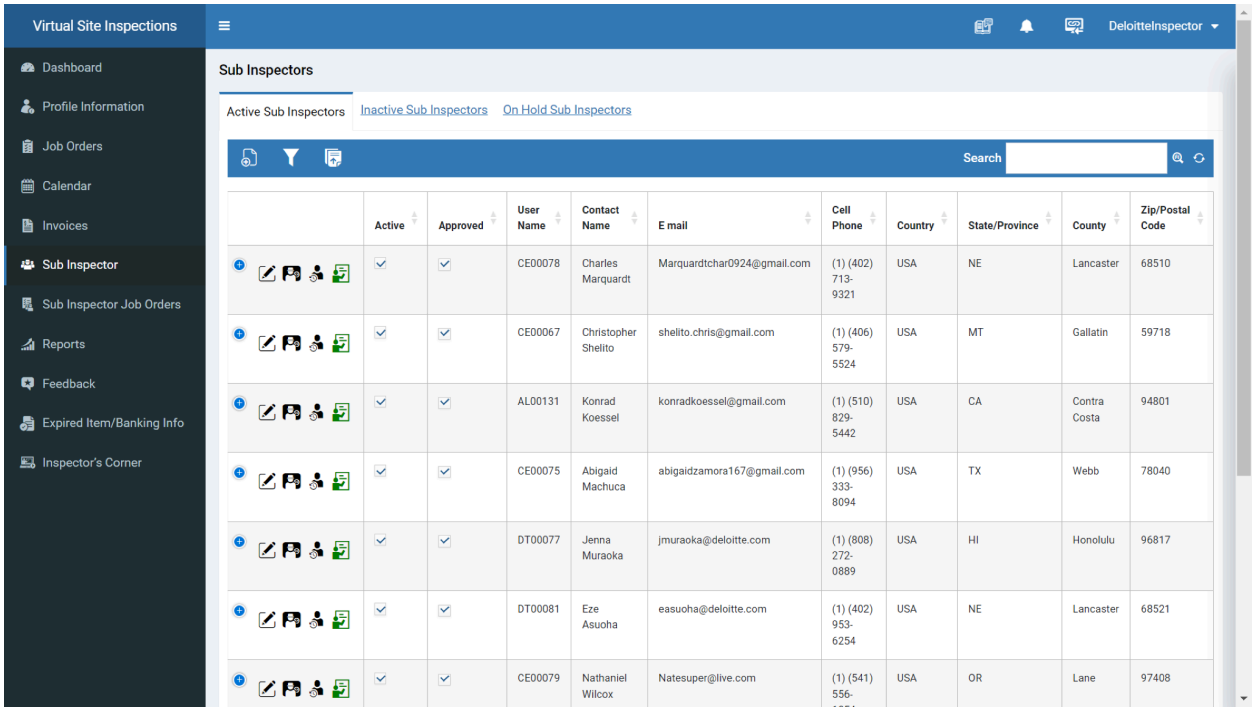
After clicking on the "Download Invoice" link, the invoice PDF file will be downloaded to your system. You can preview the content of the PDF file, as shown in the screenshot provided below.



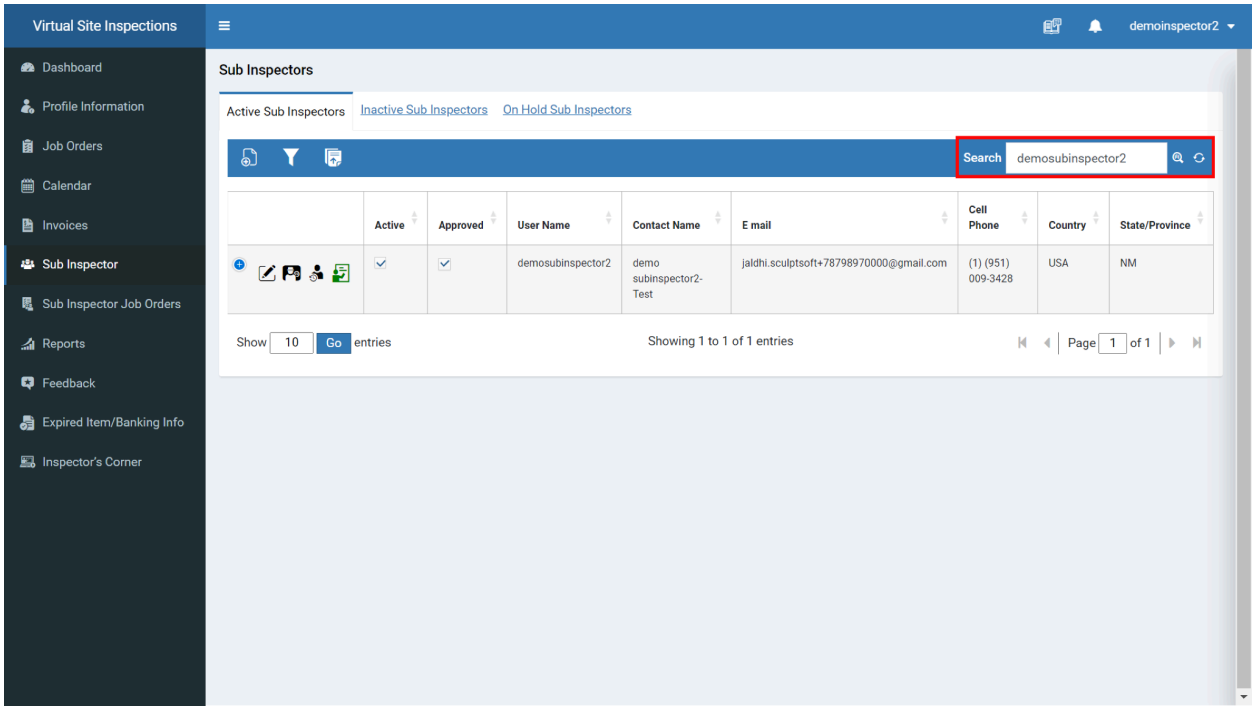
Sub inspector

Inspectors have the ability to view the sub-inspectors who have worked under their supervision.

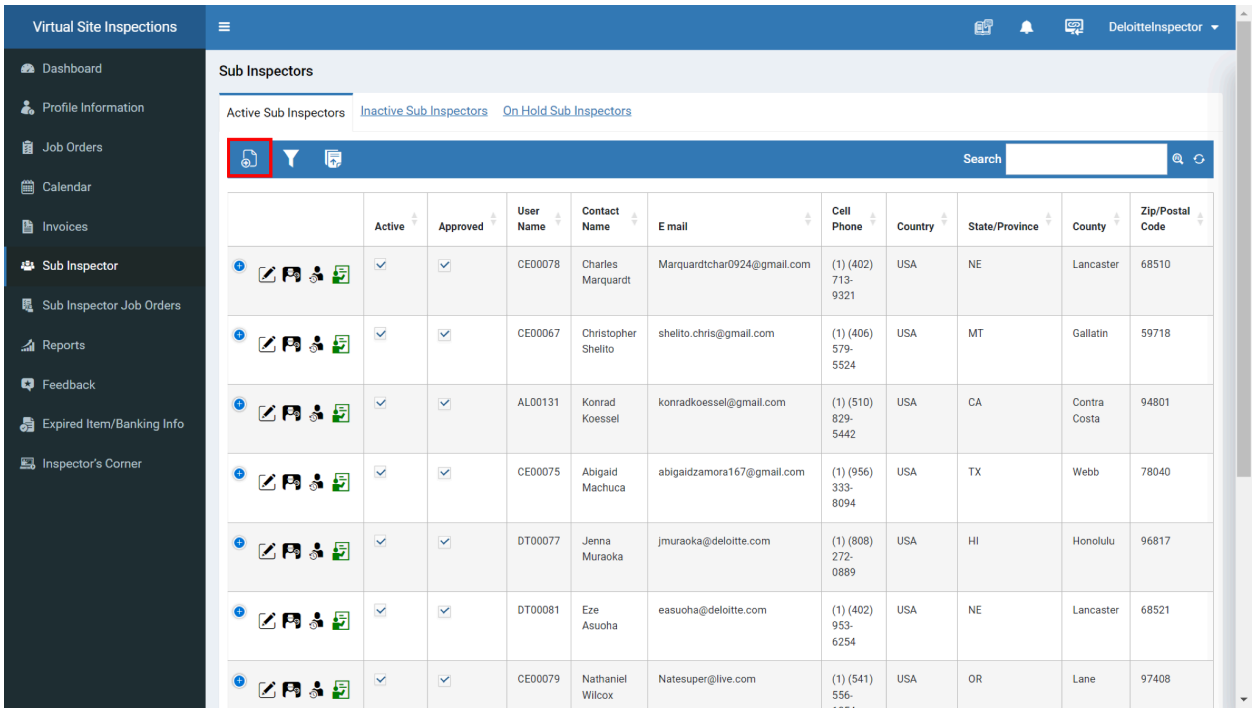
Clicking on the 'Sub Inspector' menu will open the Sub Inspector page.If we click on the 'Active' tab, it will display the list of currently active sub-inspectors who are currently working with the system. Conversely, if we click on the 'Inactive' Sub Inspector tab, it will show all the sub-inspectors who are currently inactive. The 'On Hold' list will display sub-inspectors whose background check documents have expired.



To search for Active and Inactive sub-inspector tabs using a keyword, the system conducts the search based on parameters such as contact name, email, cell phone, country, state/province, and postal code. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and then press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant sub-inspector records corresponding to the specified search criteria.



Inspectors have the capability to add a sub inspector by clicking on the 'Add New' icon.



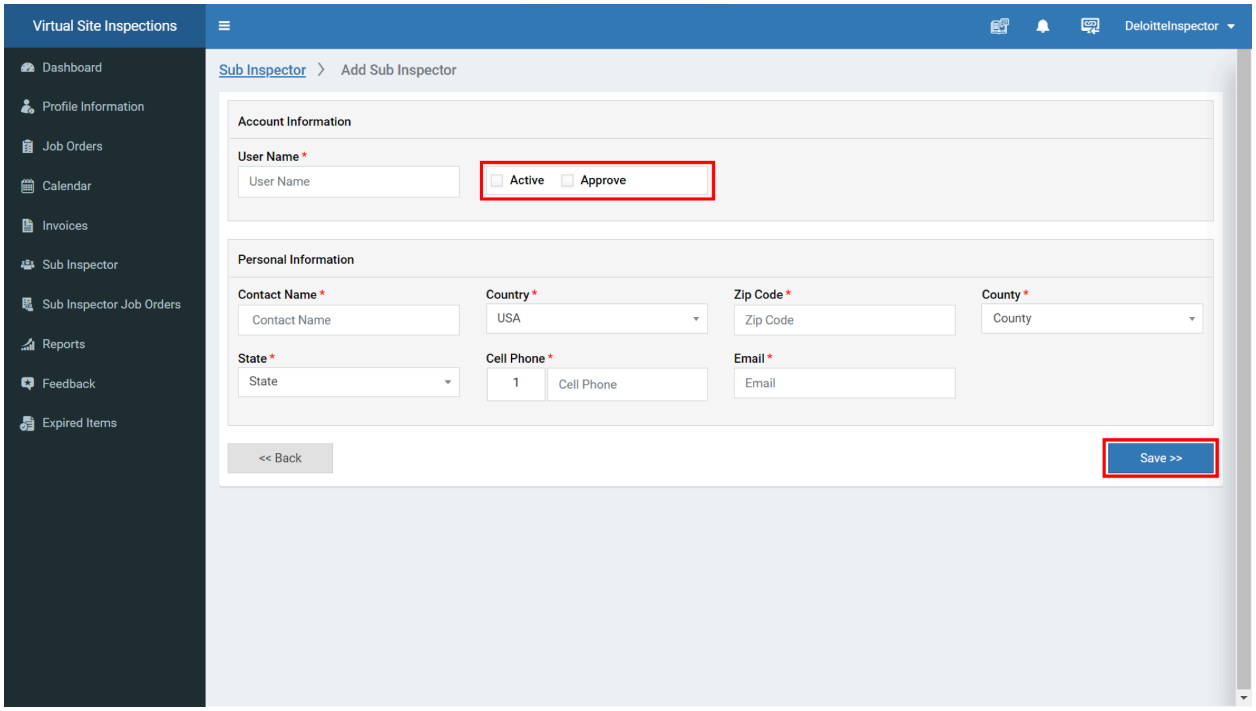
After clicking on the 'Add New' button, the system opens the 'Add Sub Inspector' page. This page is divided into two sections: 'Account Information' and 'Personal Information'.

The 'Account Information' section includes fields for the sub inspector's username and checkboxes for 'Active' and 'Approved' to grant access to the system. The 'Personal Information' section features fields such as the sub inspector's contact name, country, zip code, county, state, cell phone, and email.

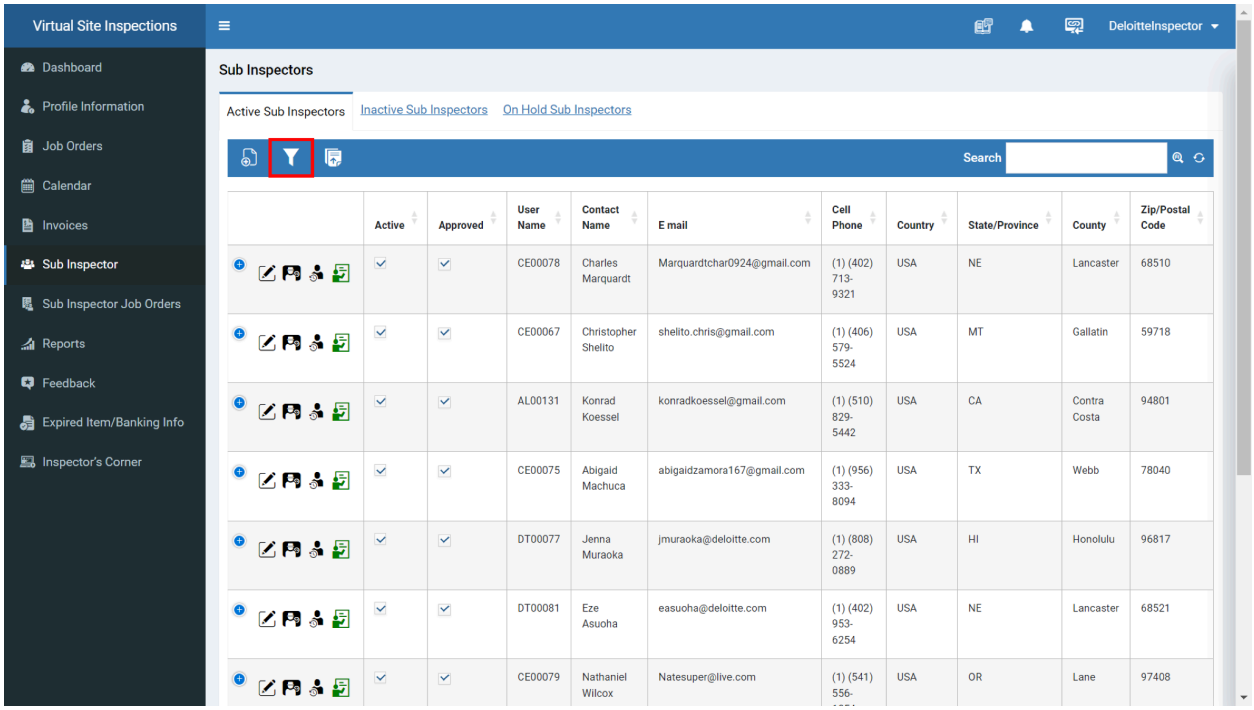
Upon selecting a country from the dropdown menu, entering the zip code or postal code automatically populates the corresponding county and state fields based on the chosen country and zip code. After filling in the required information, clicking on the 'Save' button adds the sub inspector to the list.

If the 'Active' checkbox in the 'Account Information' section is checked, the sub inspector will be listed under 'Active Sub Inspector.' Conversely, if the 'Active' checkbox is not selected, the record will appear in the 'Inactive Sub Inspector' list.

If the 'Approve' checkbox in the 'Account Information' section is selected, the sub-inspector will be able to log in; otherwise, they will be unable to access the system.

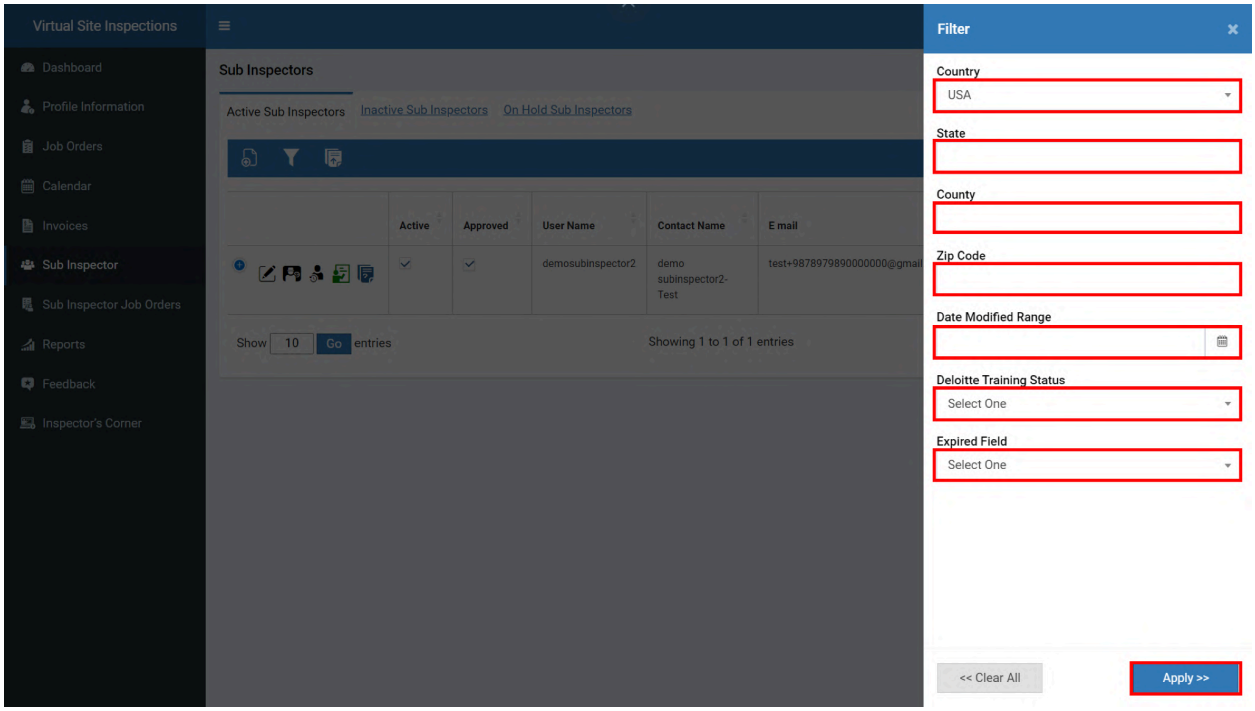


In addition, users have the option to apply filters on the 'Active', 'Inactive', ‘On Hold’ tabs. Clicking on the filter icon provides this functionality.

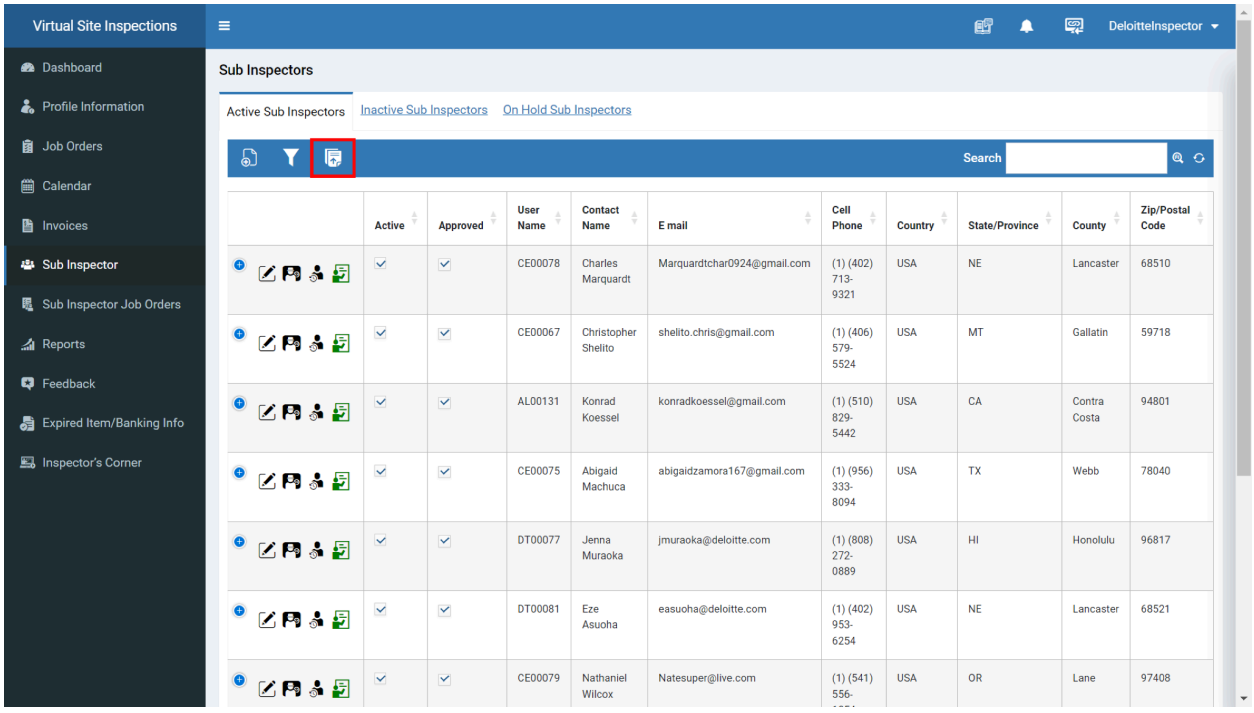


After clicking on the filter icon, a side modal will open, allowing users to apply filters on various criteria such as country, state, county, zip code, date modified range, and Deloitte training status, Expired Field. Users can select and add values in the respective fields. Upon clicking the 'Apply' button, the system will generate a list based on the selected filter options.

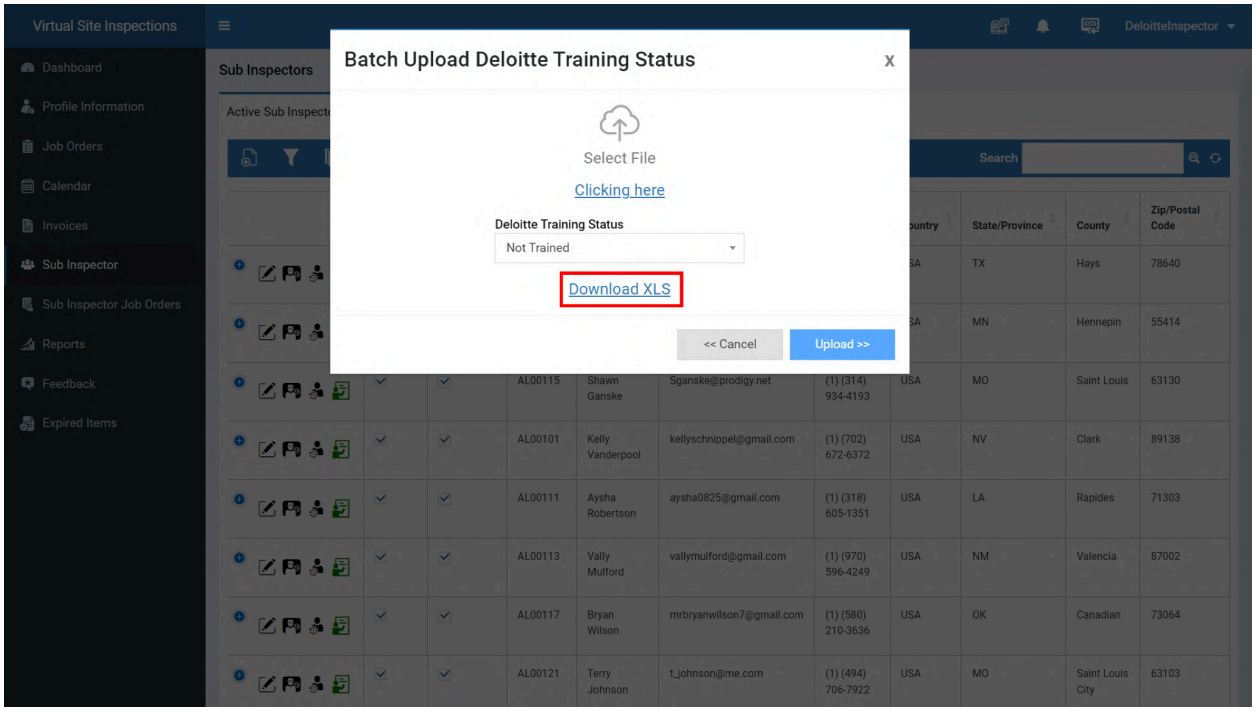
If the filter is applied to the 'Active' tab, the system will return the active sub inspector list filtered according to the specified criteria. Similarly, if the filter is applied to the 'Inactive' tab, the system will display the inactive sub inspector list based on the applied filter options. Likewise, if the filter is applied to the 'On Hold' tab, the system will display the on hold sub-inspectors based on the applied filter options.



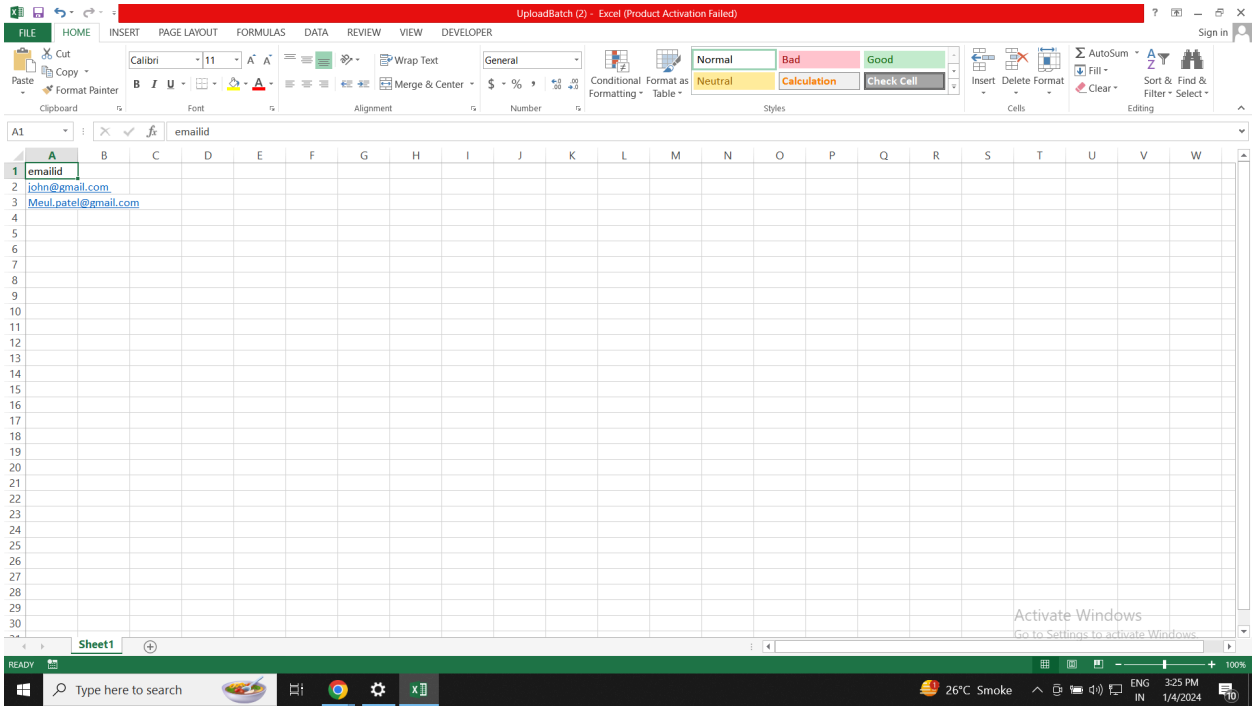
Inspectors have the capability to change the Deloitte training status of multiple inspectors simultaneously using the batch upload functionality.



Clicking on the 'Batch Upload' icon opens a pop-up box. Within this pop-up, users can click on the 'Download XLS' hyperlink to download the corresponding file.

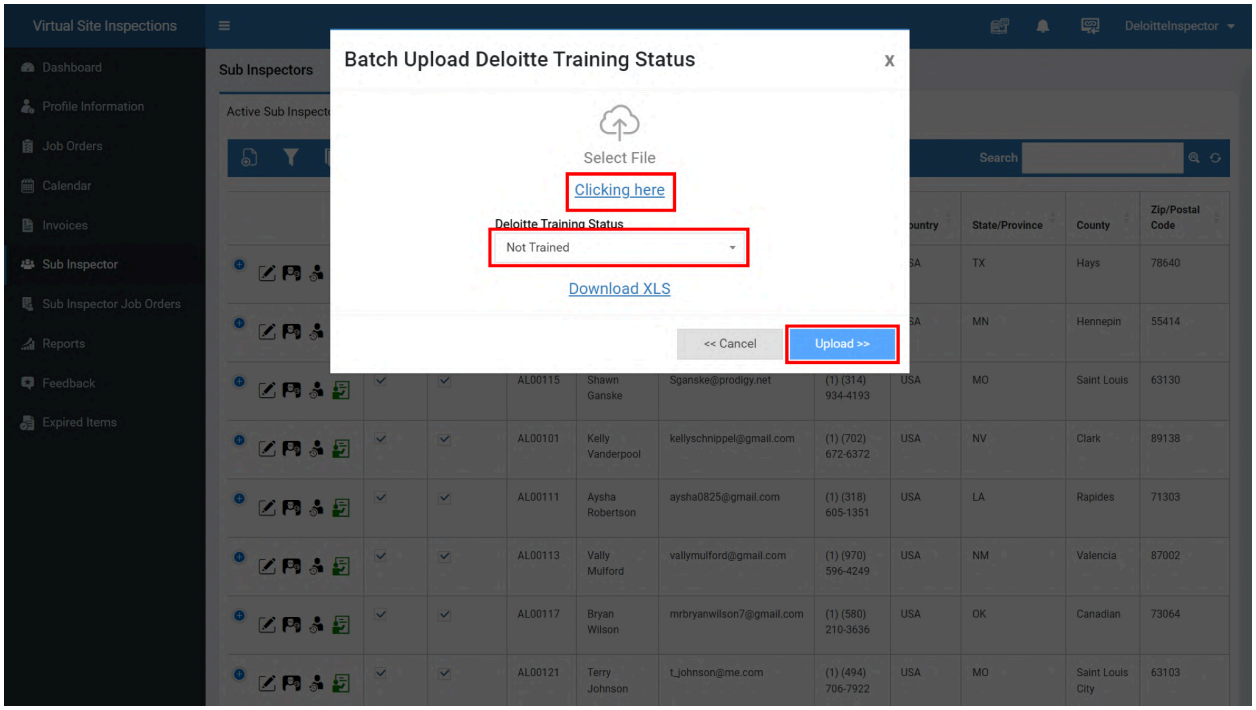


Upon clicking the 'Download XLS' hyperlink, an XLS file is downloaded to the system, comprising an 'Email' column. Users can then add the email addresses of inspectors to modify their status. Importantly, only the email addresses of inspectors already present in the system should be added for the status change to take effect.

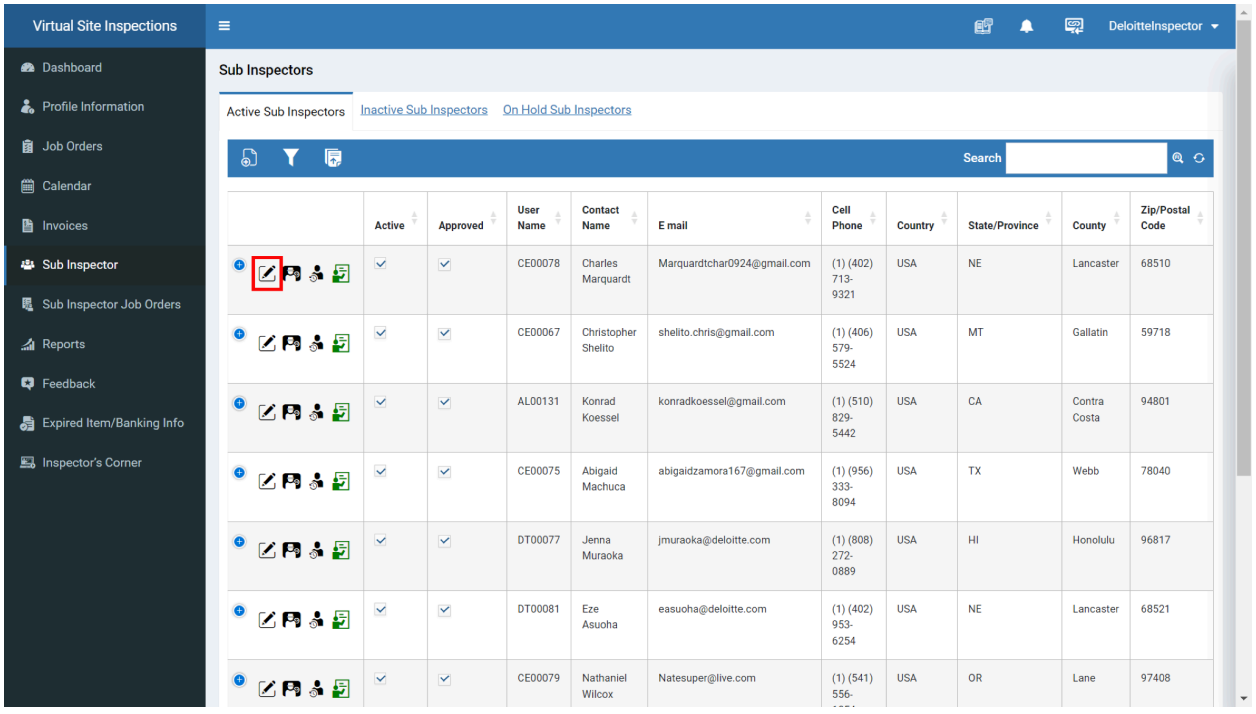


After entering all the email addresses, click on the 'Clicking Here' hyperlink to upload the file.

Once the file is uploaded, select the desired Deloitte Training Status from the dropdown menu. After completing this process, click on the 'Upload' button to change the status. This action will update the status of the inspectors whose email addresses were added in the XLS file, and these changes will be reflected in the active or inactive sub-inspector list.



Inspectors have the ability to edit the information of a sub inspector by clicking on the 'Edit Sub Inspector' icon.

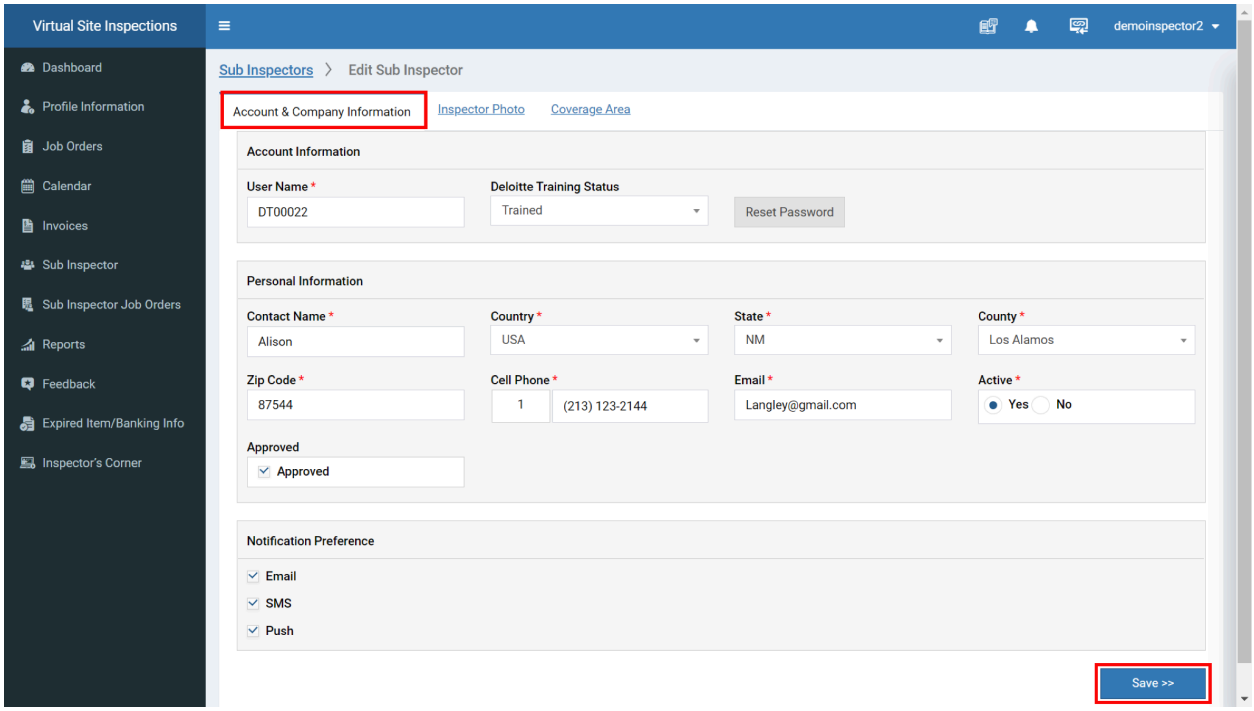


After clicking on the 'Edit Inspector' icon, it will open the 'Edit Inspector' page, which consists of three sections: 'Account & Company Information', 'Inspector Photo' and 'Coverage Area.

The 'Account & Company Information' tab comprises three sections: 'Account Information', 'Personal Information' and 'Notification Preferences.' Inspectors can modify various details of the sub inspector within these sections.

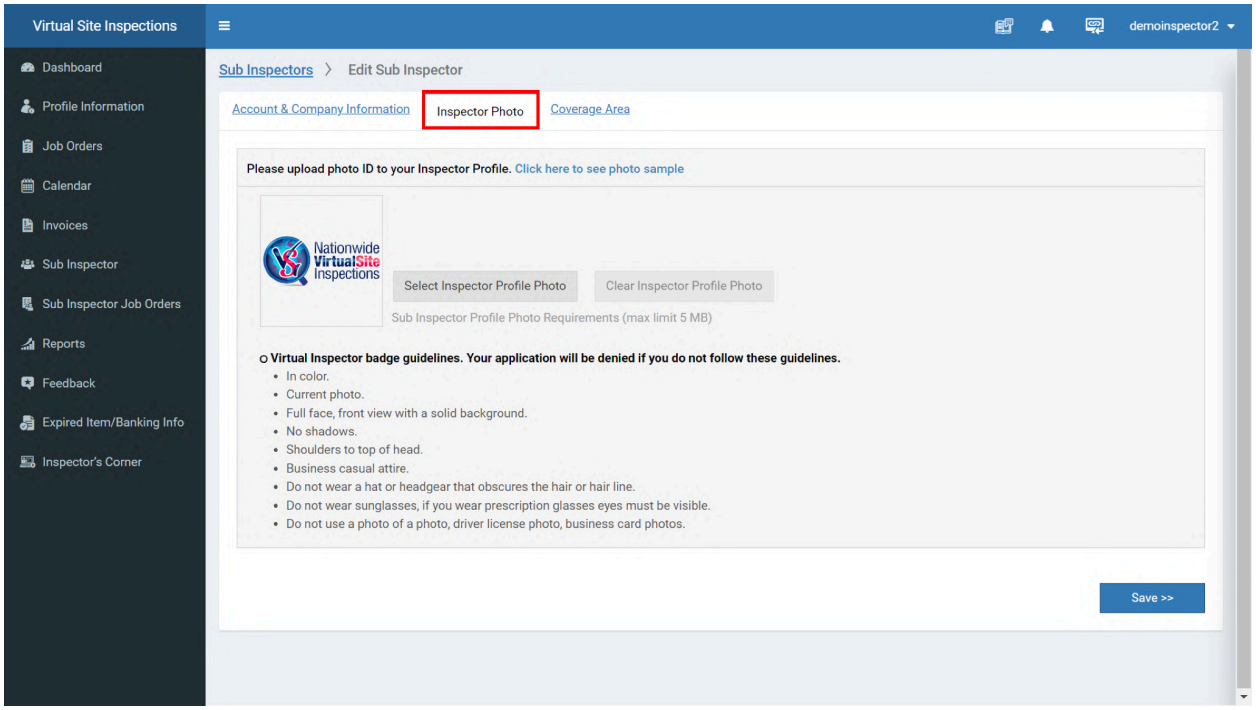
The 'Account Information' section allows changes to account details, while the 'Personal Information' section enables edits to personal information. In the 'Notification Preferences' section, fields for email, SMS, and push notifications are available. Selecting any of these options will ensure that the sub inspector receives notifications through the chosen channel.

Additionally, if the 'Reset Password' button is clicked, a change password link is sent to the sub inspector's email address.

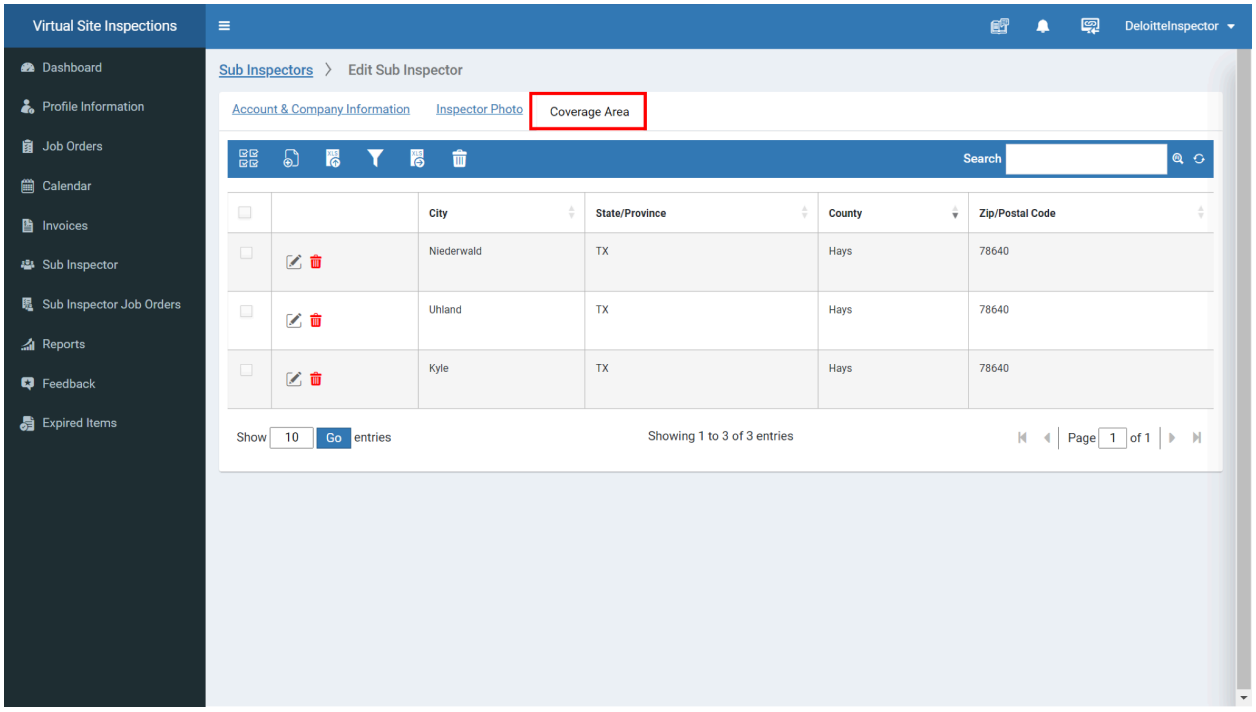


Clicking on the 'Save' button will update all the information in the sub inspector's profile.

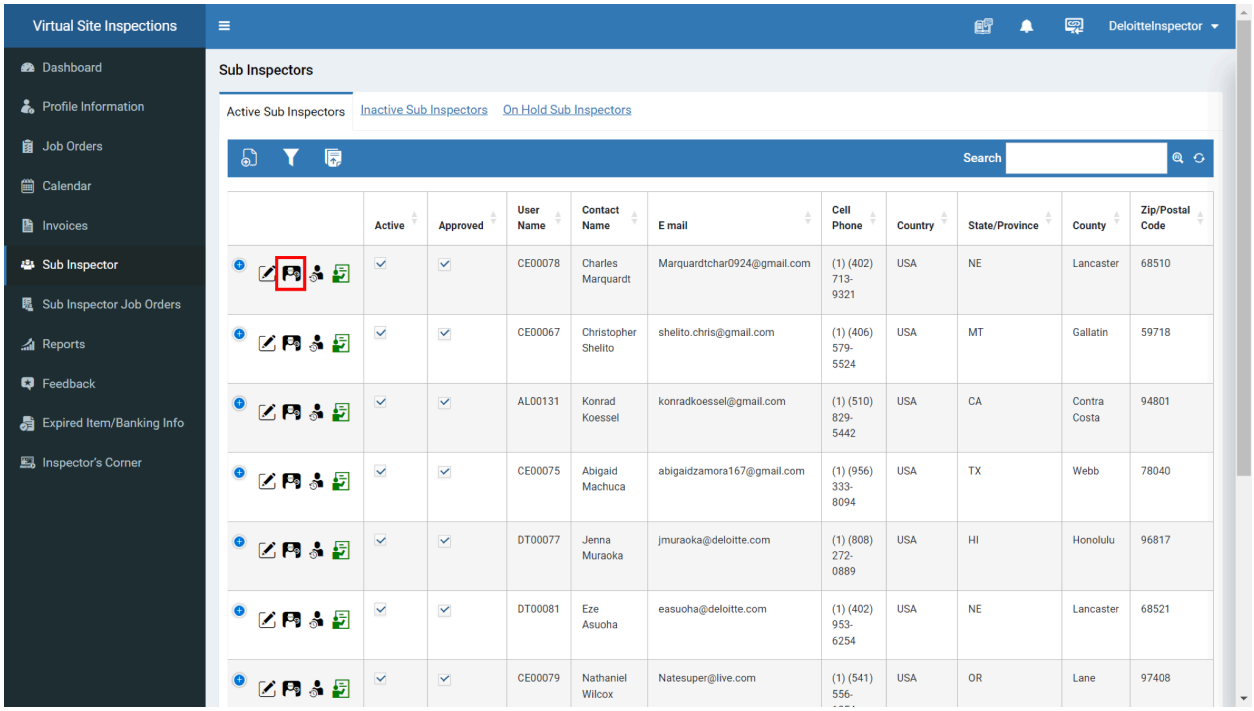
Clicking on the 'Inspector Photo' tab allows the inspector to change the photo of the sub inspector. Make sure you click the ‘Save >>’ button to save the changes.



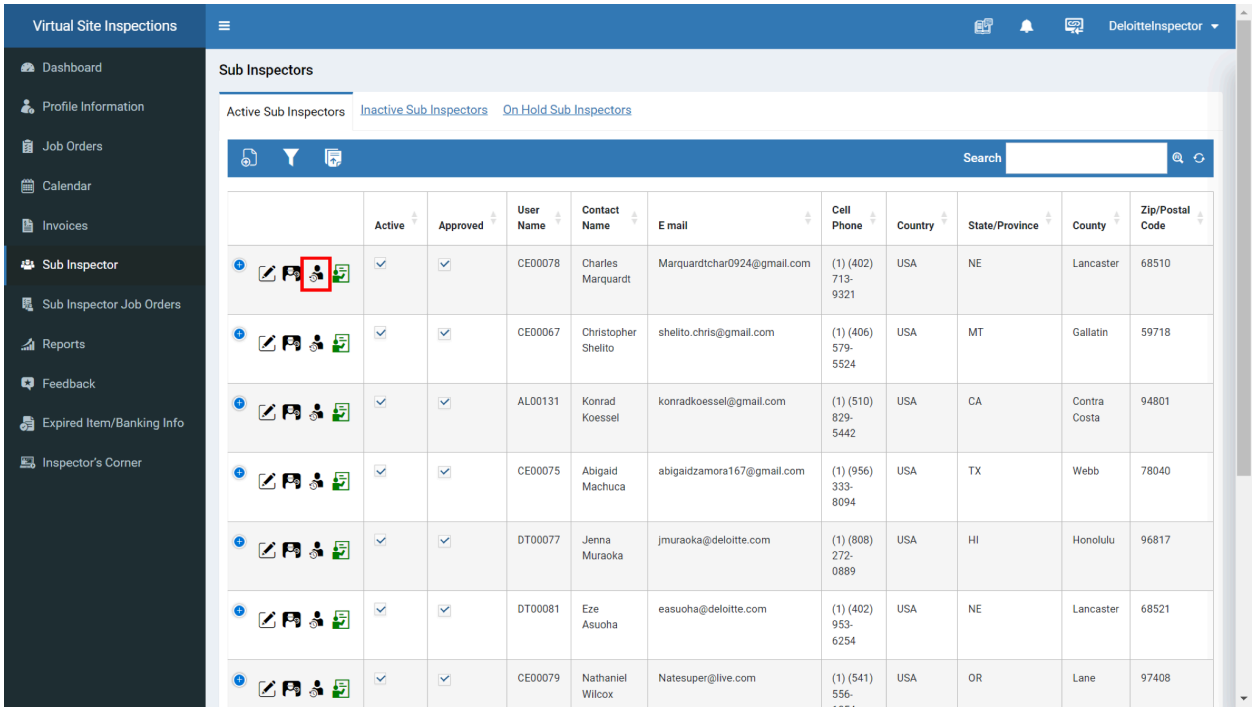
The 'Coverage Area' tab features the same actions and functionalities as those found in the inspector profile's coverage area section.



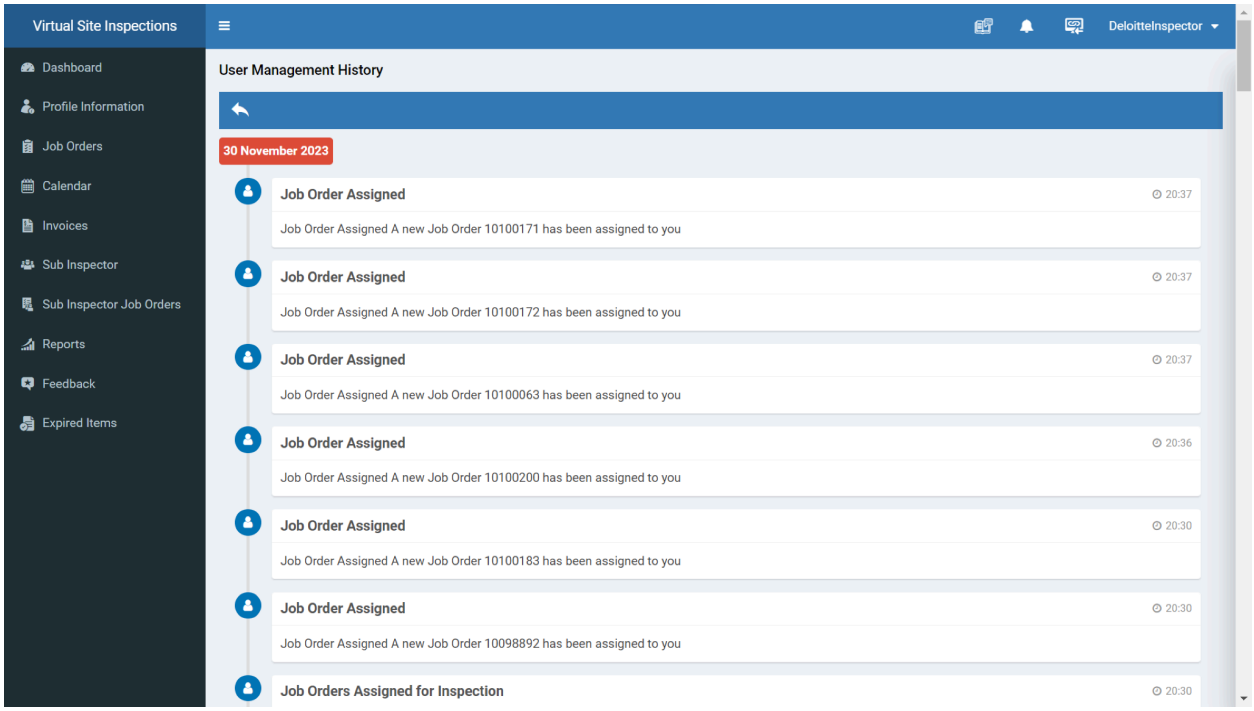
The inspector can access the sub inspector portal by clicking on the 'View Sub Inspector Portal' icon.



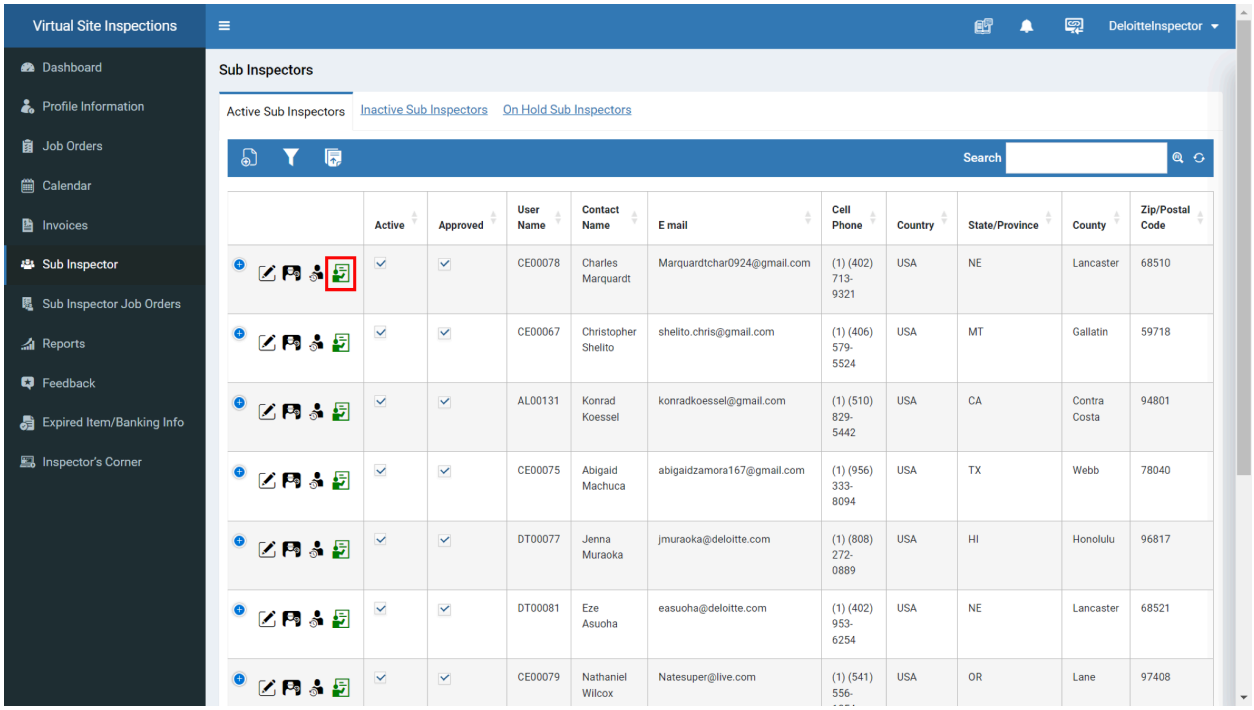
The inspector can also view all activities/events related to the sub inspector by clicking on the 'User Management History' icon.



After clicking on that icon, the history page will open, displaying all relevant activities/events related to the sub inspector.

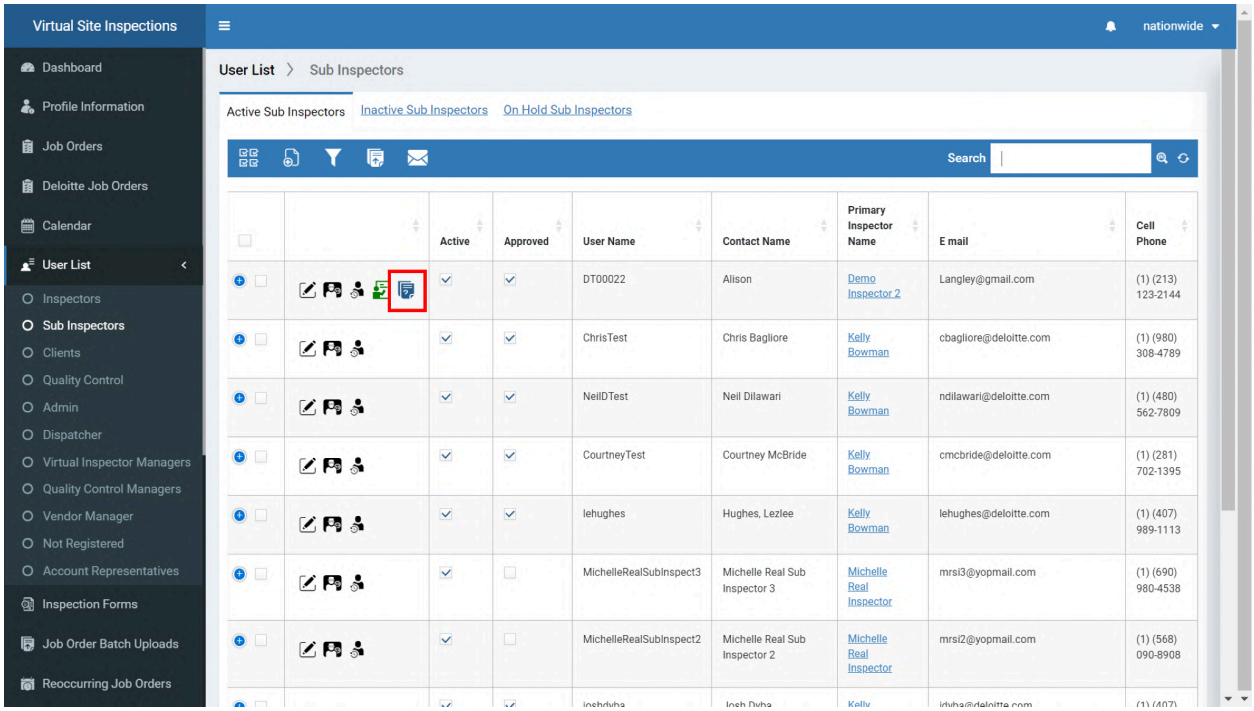


The highlighted icon below indicates the Deloitte Training status. A green icon signifies that the inspector is fully trained, yellow indicates partial training, red signifies no training, and black denotes that the inspector has opted out of training.



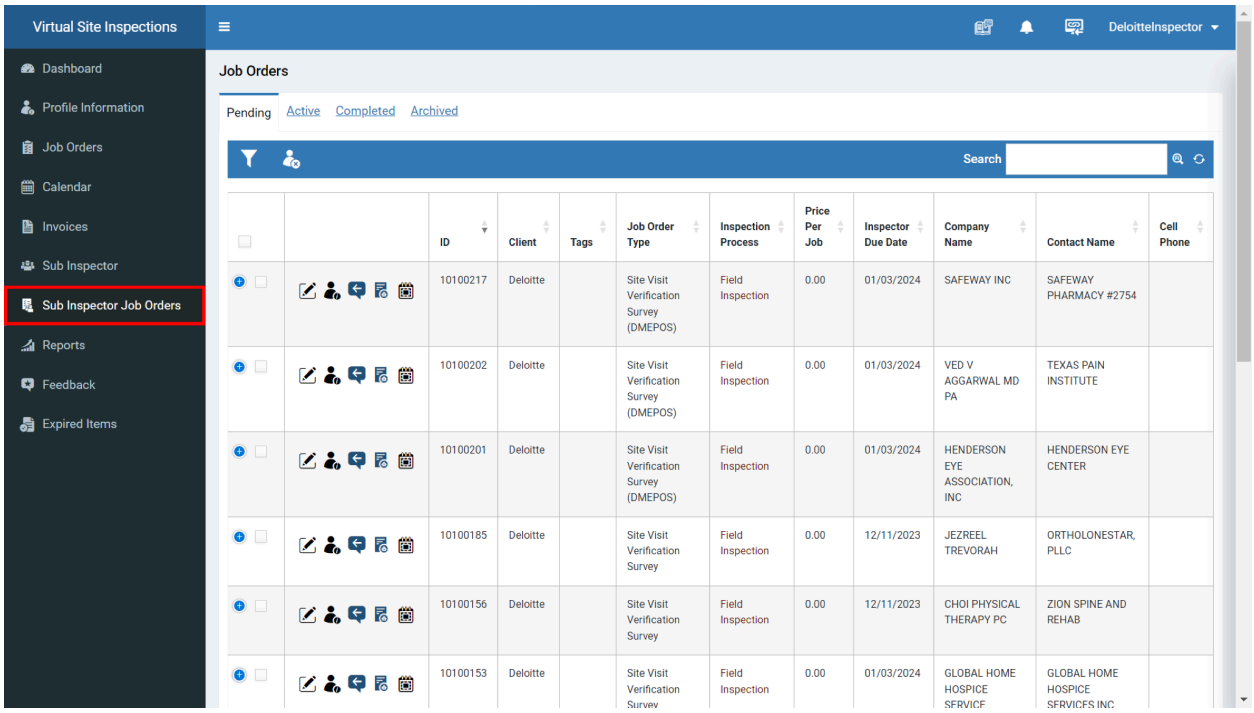
Expired Documents

In the sub-inspector list, the 'Expired Documents' icon will indicate the inspector whose document has expired.



Sub Inspector Job Orders

The inspector can view the job order list for sub inspectors by clicking on the 'Sub Inspector Job Order' menu on the left side.



Within the job order interface, distinct tabs, including Pending, Active, Completed, and Archived, categorize job orders based on their status. Selecting a specific tab loads a corresponding job order list, accompanied by blue header options tailored to the selected status.

Pending Tab

The "Pending" tab displays job orders assigned to sub inspectors by the inspector. When selecting the "Pending" status, the blue header bar presents options including "Filter", "Unassign Sub Inspector".

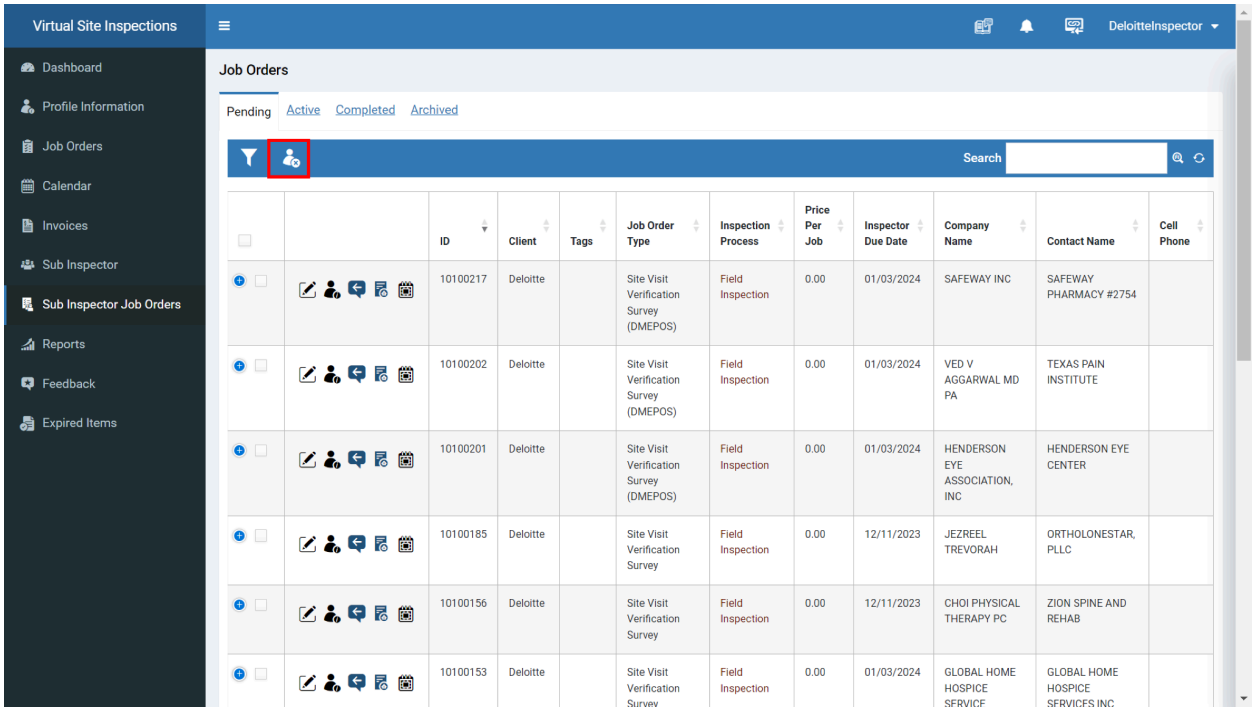
Filters functionality includes fields such as Job Order Types, Job Order Tags, Sub inspector,Client, Country, State, County, Zip/Postal Code, City, and Inspector Due Date,Date completed. Users can select values from the dropdown menus for Client, Country, State, County, Zip/Postal Code, City, Job Order Types, and Job Order Tags.

For the Inspector Due Date and Date Completed, users can choose a value from the date picker, specifying a specific range from the "From" date to the "To" date.

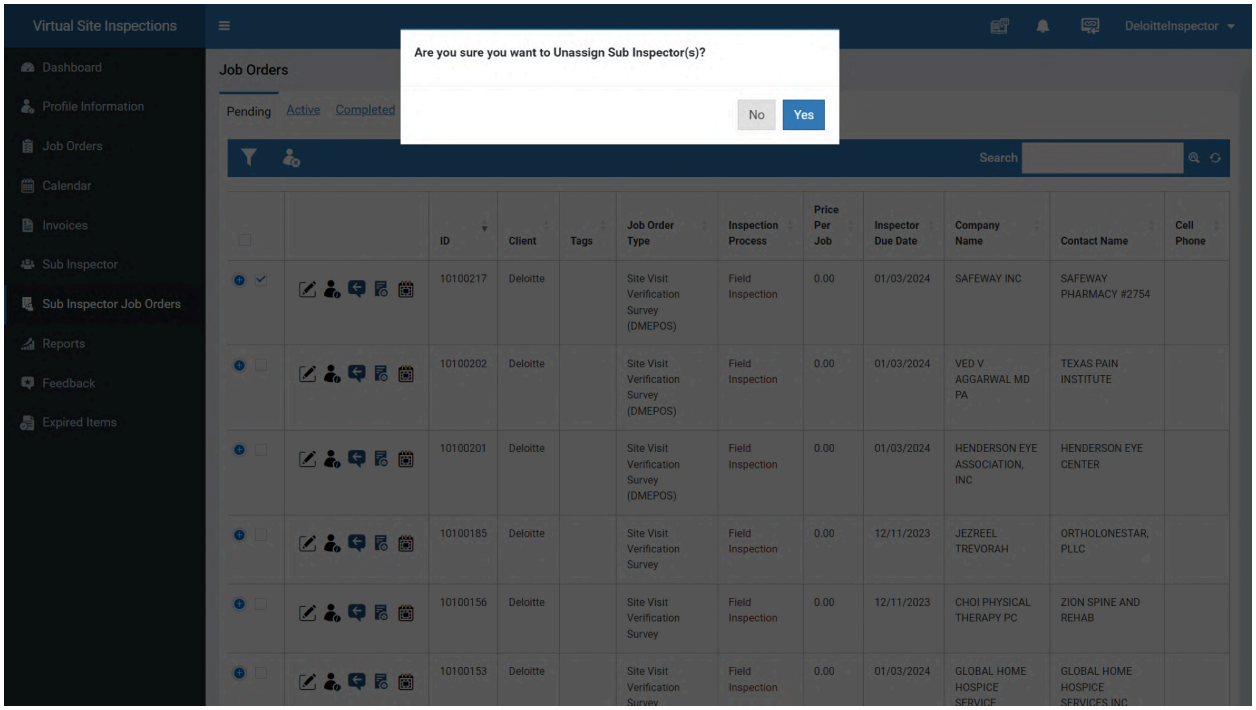
Additionally, there is an interconnected feature: if a country is selected, the state dropdown will dynamically load options based on the chosen country. Similarly, selecting a state will load options for county and zip code or postal code will dynamically load options based on the chosen state.Similarly, selecting a county will load options for city and after selecting city will dynamically load options for zip code/ postal code. This interconnected filtering system enhances the precision of selecting criteria in the "Pending" tab.

Upon selecting values from the filters, click on the "Apply" button. This action will retrieve and display relevant job order data in the list based on the specified filter criteria.Conversely, clicking the "Clear All" button will reset both the job order list and the Filters fields, restoring them to their default states.

Inspectors also have the ability to unassign a sub inspector from a job order. By selecting the desired job order and clicking on the 'Unassign Sub Inspector' icon, the sub inspector will be removed from the job order. The unassign sub inspector functionality is applicable only for job orders listed under the 'Pending' and 'Active' tabs.



After clicking on the 'Unassign Sub Inspector' icon, a confirmation pop-up will appear, prompting the user to confirm the unassignment. If the user clicks on the 'Yes' button, the sub inspector will be successfully unassigned from the job order.



Active Tab

When you click on the "Active" status, it shows job orders that have been accepted by sub inspectors.

When selecting the "Active" status in the blue header bar, it offers options such as "Filter", "Un Assign sub-inspector".

In the "Active" tab, you can perform the same actions as explained above for the Pending tab for the fields:"Filter", "Unassign Sub inspector".

Completed Tab

When you select the 'Completed' status, it shows job orders that have been completed by the sub-inspector.

In the "Completed" tab, you can perform the same actions as explained above for the "Active" tab with regard to the fields: "Filter".

Archived Tab

When you choose the "Archived" status, it shows all job orders that have been archived by the administrator.

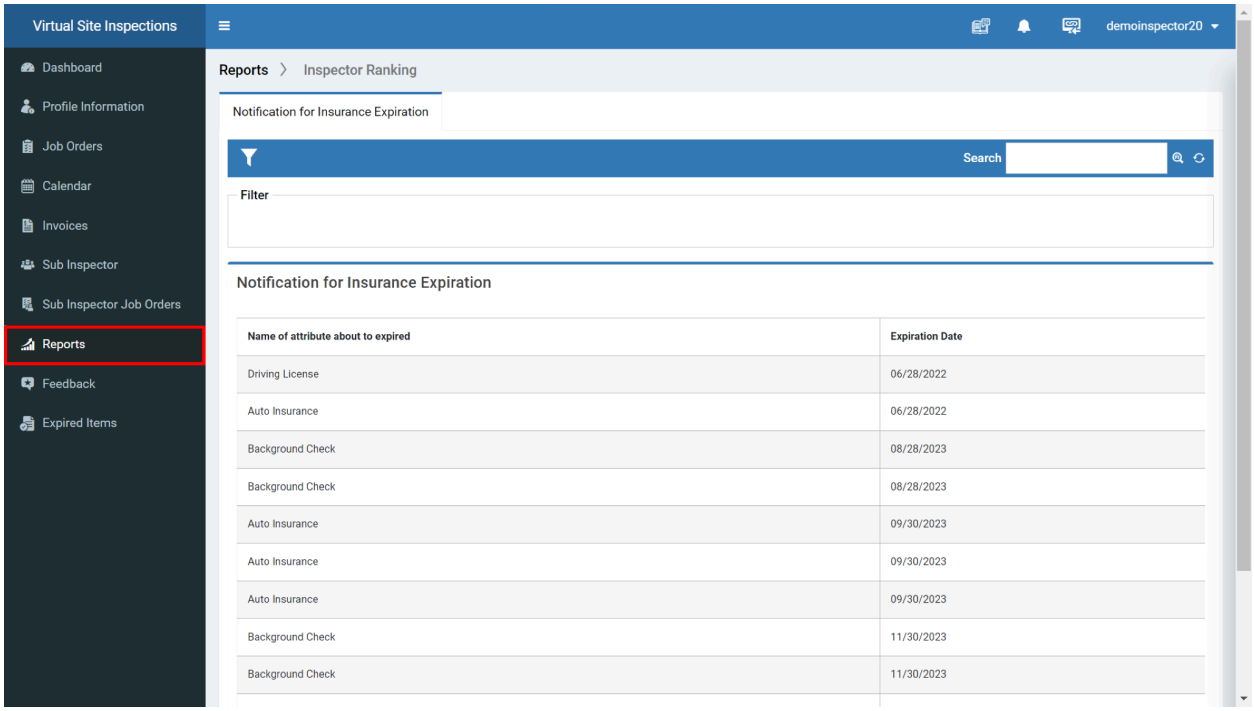
In the "Archived" tab, you can perform the same actions as explained above for the "Active" tab with regard to the fields: "Filter".

Job Order Actions

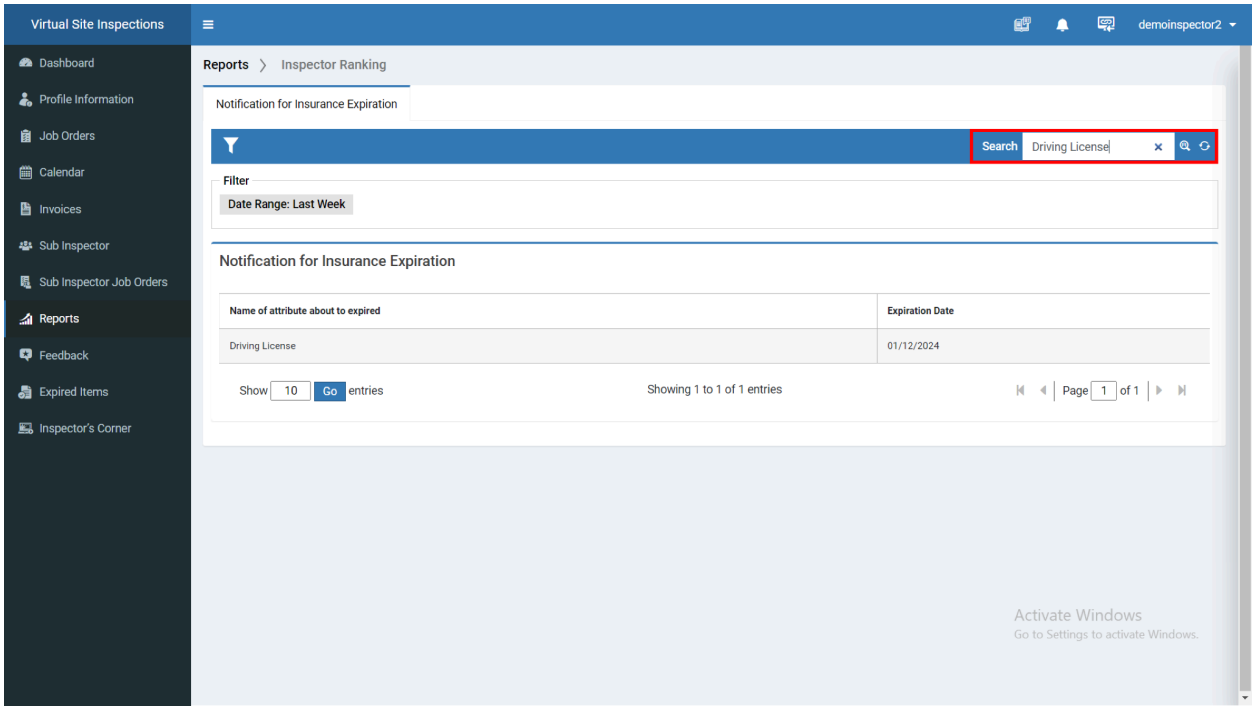
All the actions within the job order list for sub inspectors mirror those found in the inspector's job order list.The job order list offers multiple functionalities, editing orders, accessing property details, viewing user information, downloading available documents, reviewing redo reasons, and exploring delay reasons. These functionalities are presented based on the specific tabs, providing a comprehensive overview of job order details and actions.

Reports

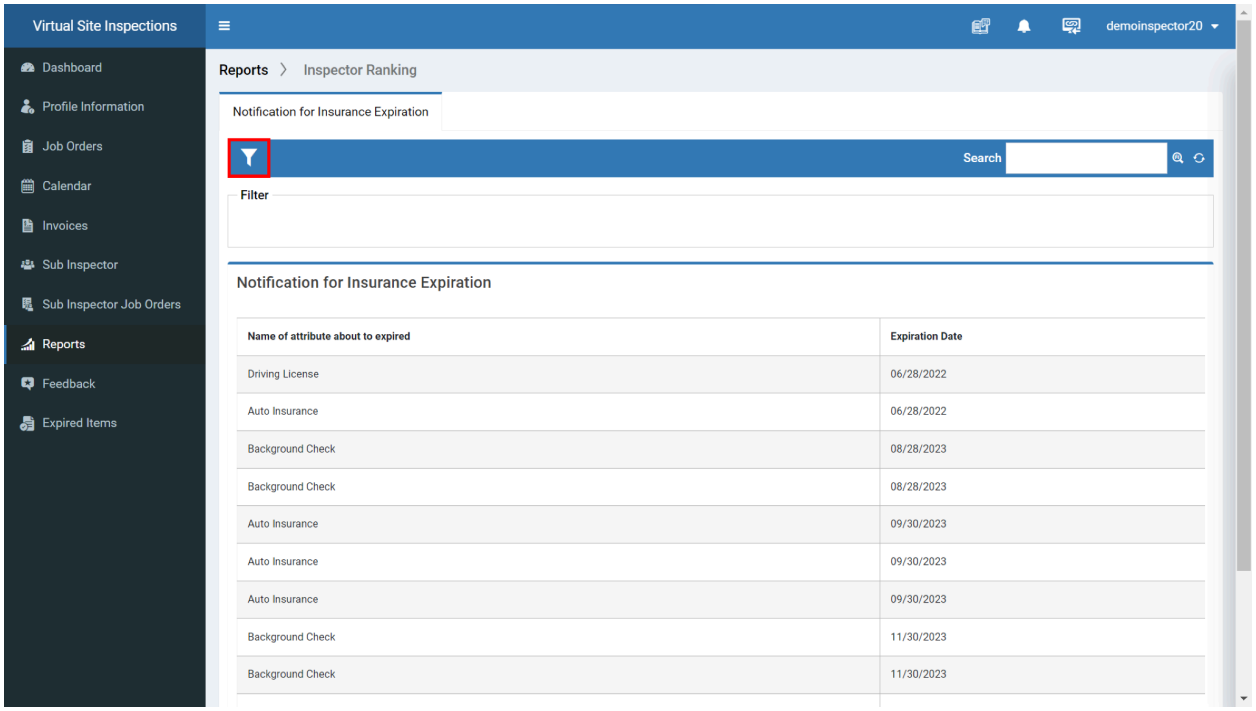
The 'Reports' feature serves the purpose of showing pre-defined notifications indicating the expiration of your items & documents such as Driving License, Auto Insurance and Background Check.



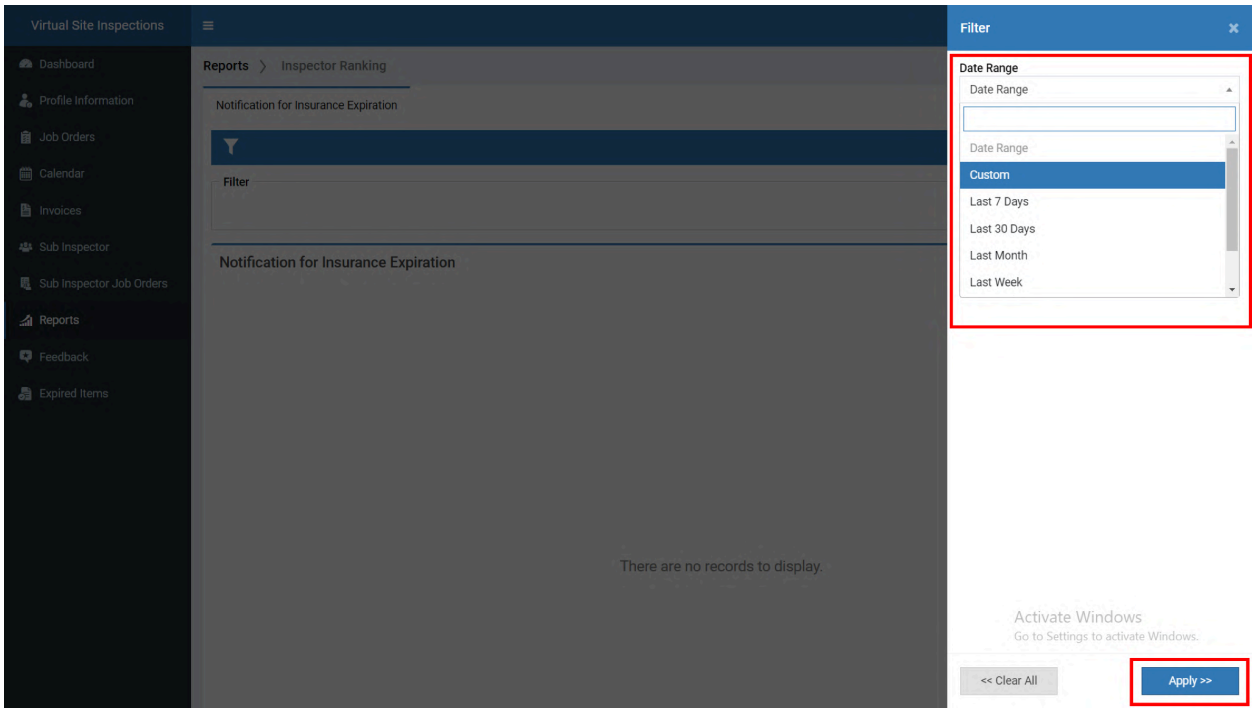
To search for notifications regarding insurance expiration using a keyword, the system conducts the search based on parameters such as the name of the attribute about to expire. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and then press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant notification records for insurance expiration information corresponding to the specified search criteria.



The 'Insurance Expiration' notification tab displays all upcoming expired items & which are already expired. Additionally, users can apply filters by clicking on the filter icon.

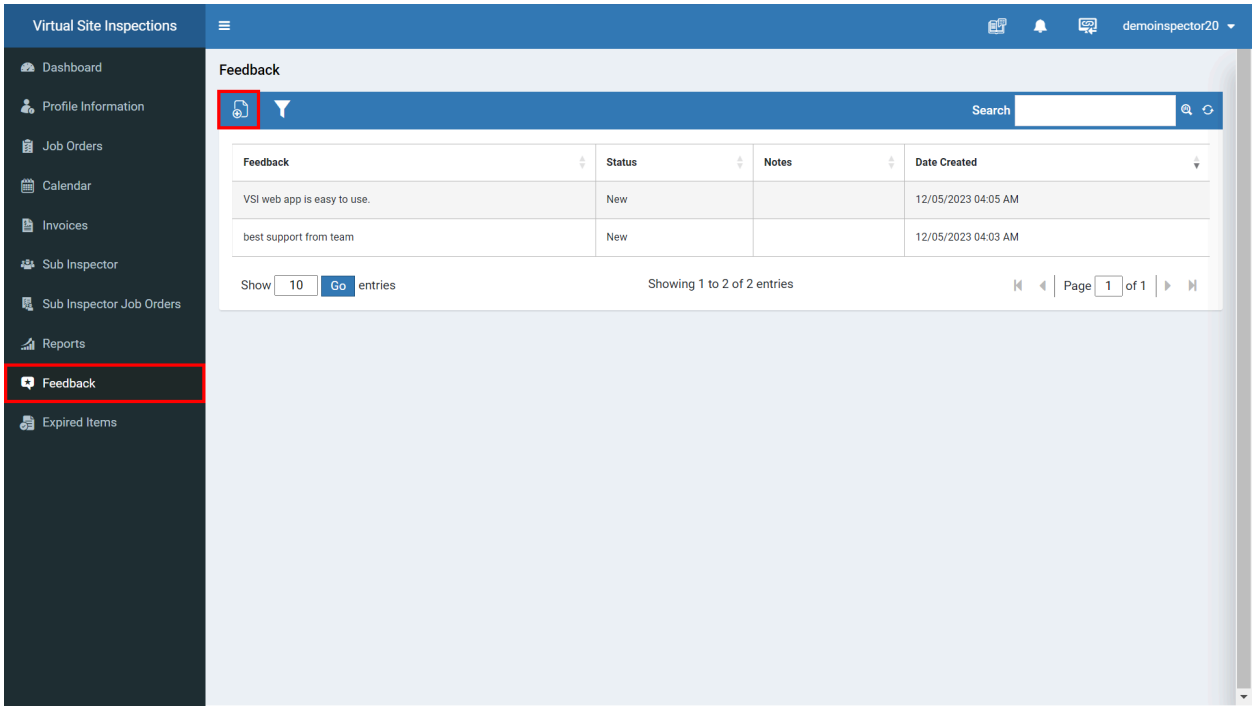


When the filter icon is clicked, a side modal opens, allowing users to apply filters based on specific range and days. Users can select values from the dropdown menu and click the 'Apply' button, resulting in the display of filtered data in the list.



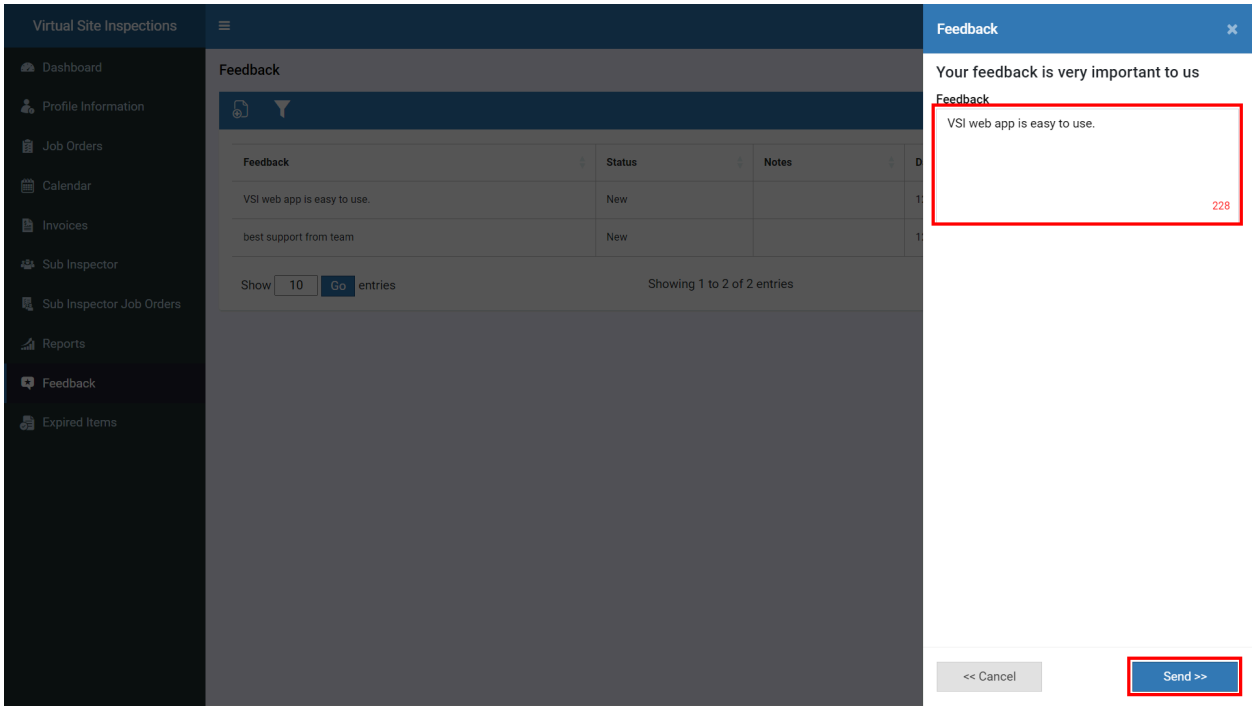
Feedback

Inspector can provide feedback by clicking on the 'Feedback' menu located in the left-side panel of the Inspector, which then redirects them to the feedback page.

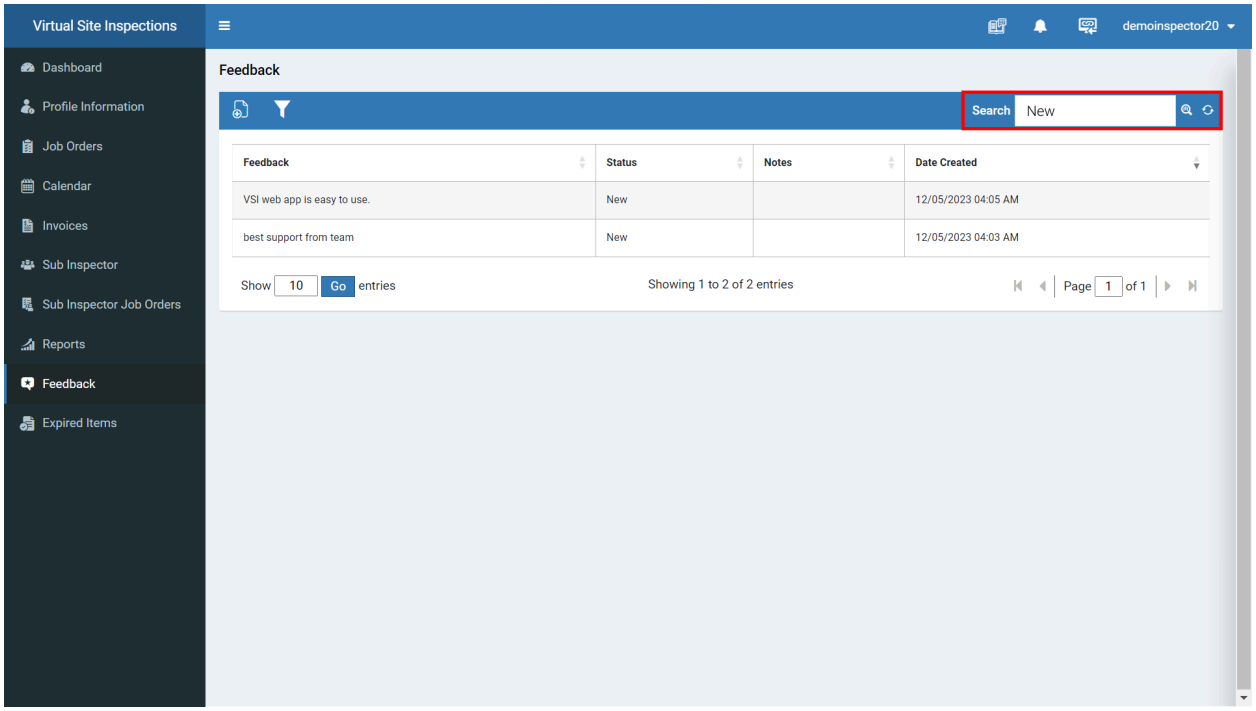


On the feedback page, a blue header bar is present. By clicking on the "Add New" icon within this header, a side modal opens, enabling users to submit feedback to the admin, as illustrated in the accompanying screenshot below.

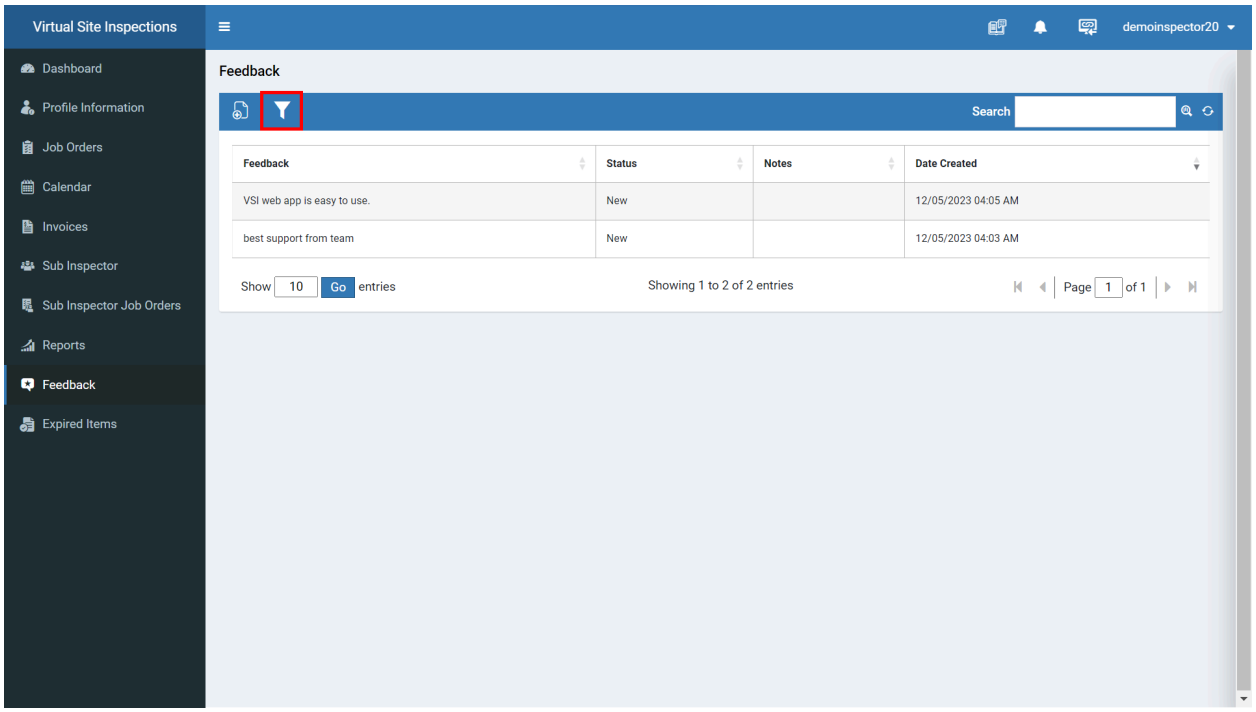
Users can input their feedback in the feedback text box, with a maximum character limit of 255. After entering their feedback, users can click on the "Send" button. Subsequently, the side modal will close, and the feedback is sent to the admin. The user's feedback is then displayed in the feedback list with a new status. The admin has the ability to reply to the feedback, and the status can be changed from 'new' to 'acknowledged.



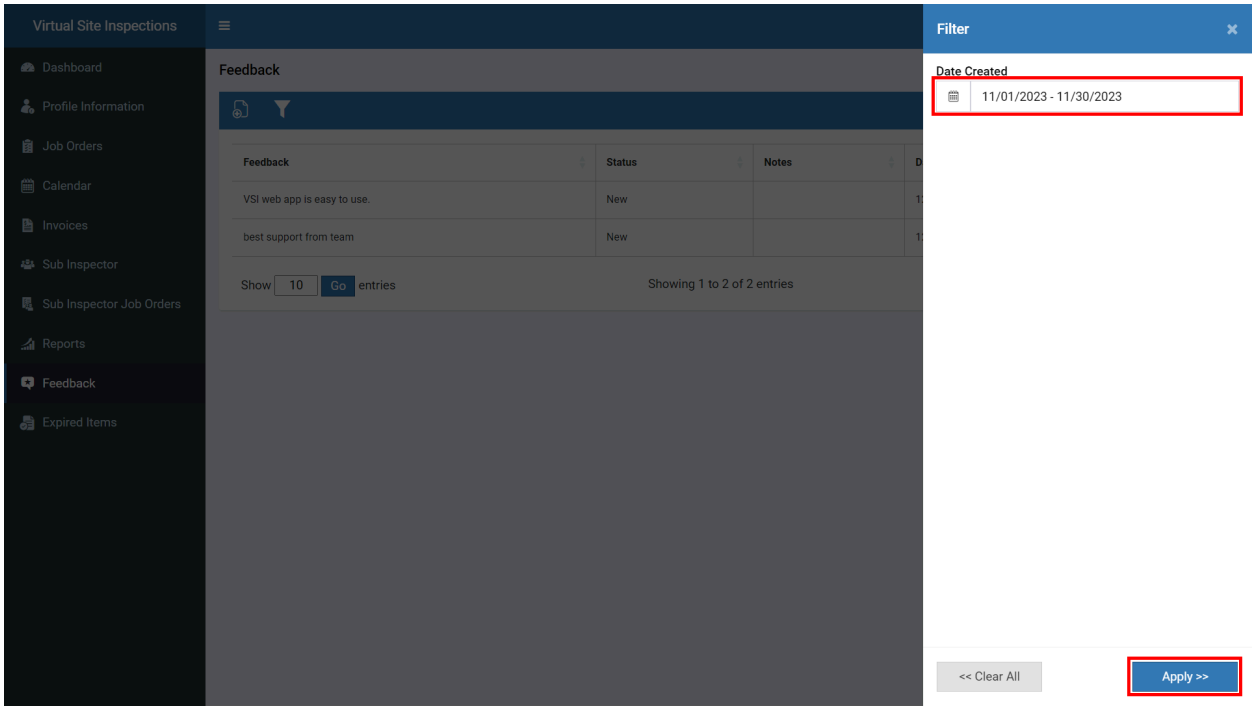
To search for feedback using a keyword, the system conducts the search based on the feedback and status parameters. Enter your search term in the highlighted search field, as shown in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant feedback records corresponding to the specified search criteria.



Users can utilize the filter option for feedback, accessible in the blue header bar as depicted in the accompanying screenshot.



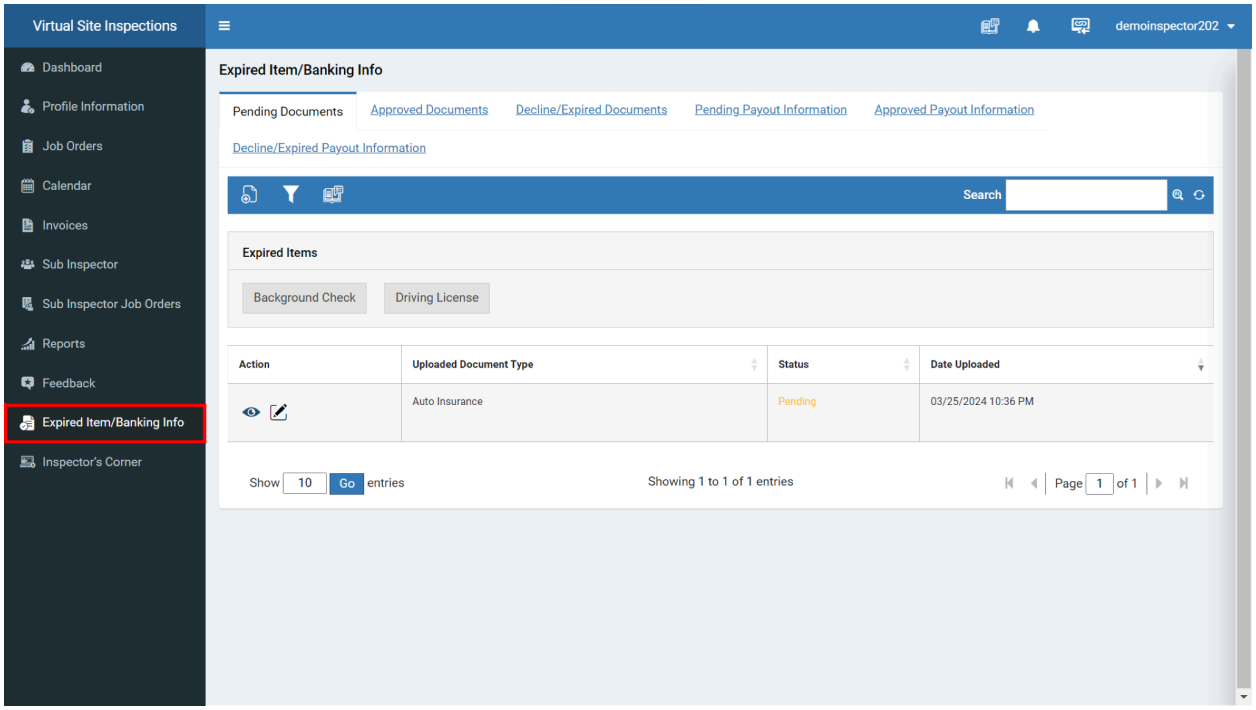
Clicking on the "Filter" option will open a side modal. Within this filter modal, there is a text box labeled "Date Created" where users can apply filters based on a specific date range using the date picker. Once the desired date range is selected, clicking on the "Apply" button will implement the filter, returning the records in the feedback list. Subsequently, the side modal will close.



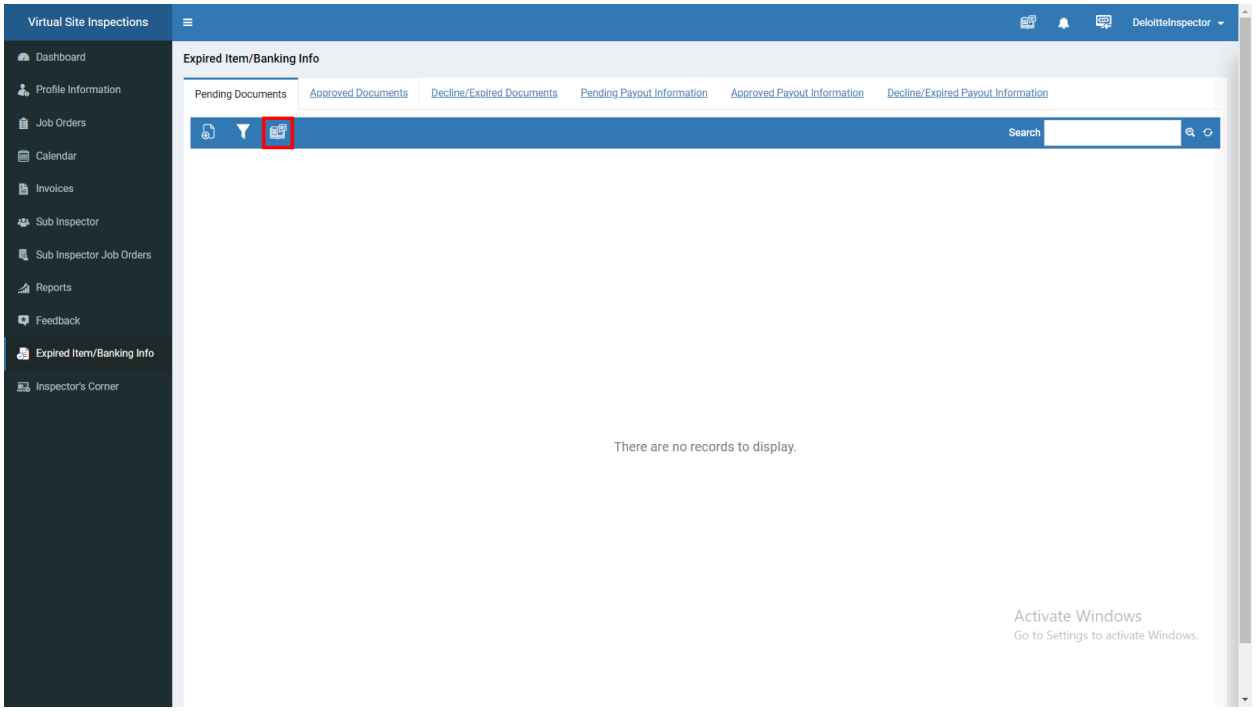
Expired Items/Banking Info

The "Expired Item/Banking Info" feature serves the purpose of uploading new documents if the existing ones have expired. Additionally, it allows the addition of payout information. However, this menu will not be visible when your profile status is InActive.

Inspectors can access the Expired Items by clicking on the 'Expired Item/Banking Info' menu located in the left-side panel. This action directs users to the Expired Item/Banking Info List page, where they can view and manage documents that have reached their expiration date.

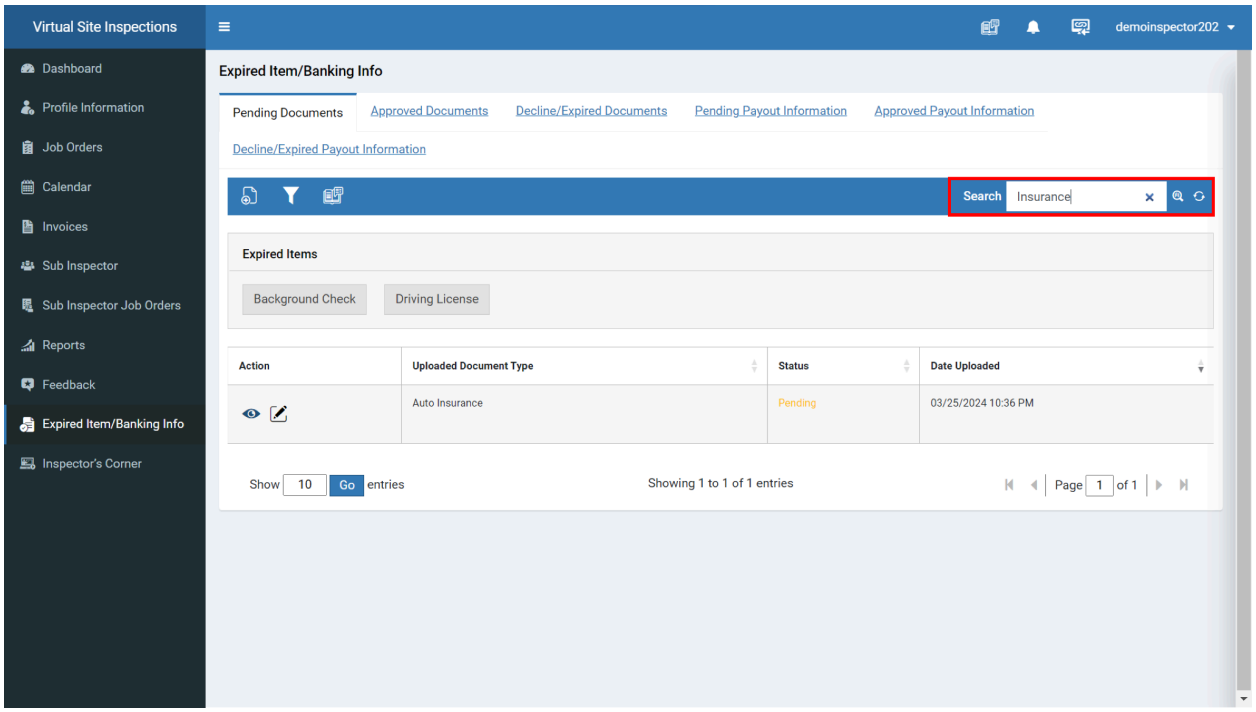


To access the User Guide, click on the "Expired Item User Guide" button provided. This action will redirect you to a new page and display information related to the Expired Item.

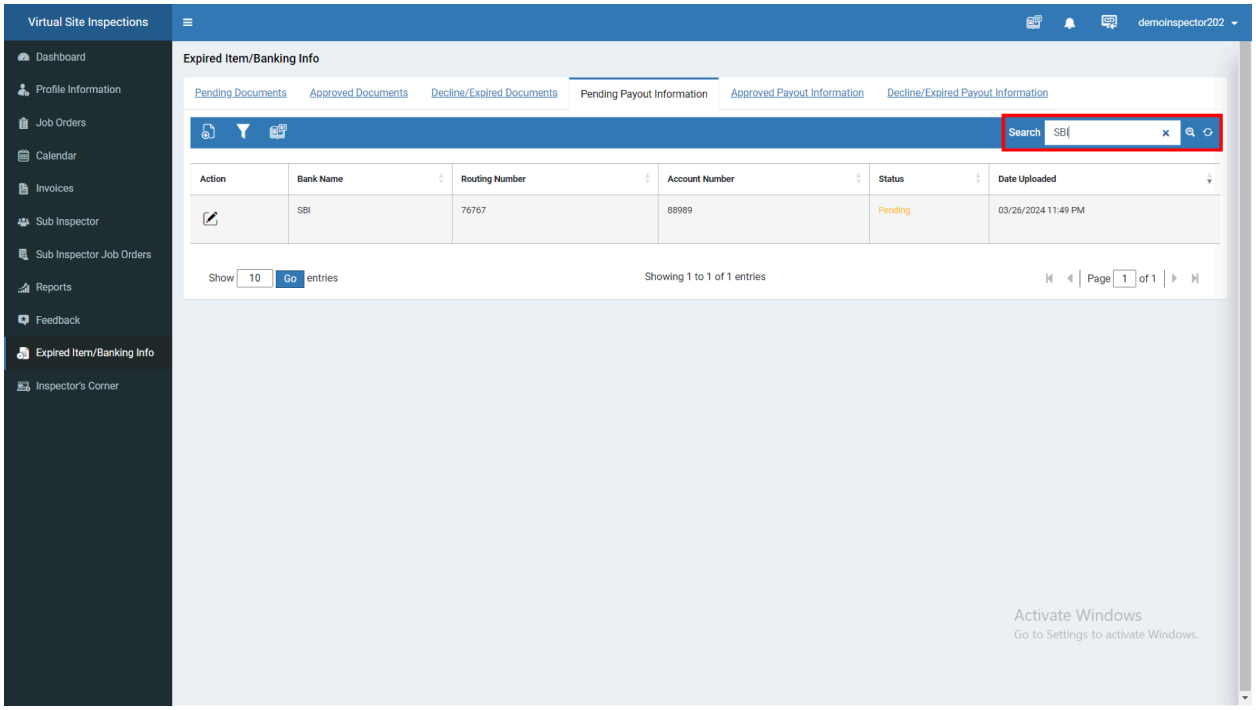


To search for a document using a keyword, the system conducts the search based on the uploaded document type parameters. Enter your search term in the highlighted search field, as

demonstrated in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant document records corresponding to the specified search criteria.

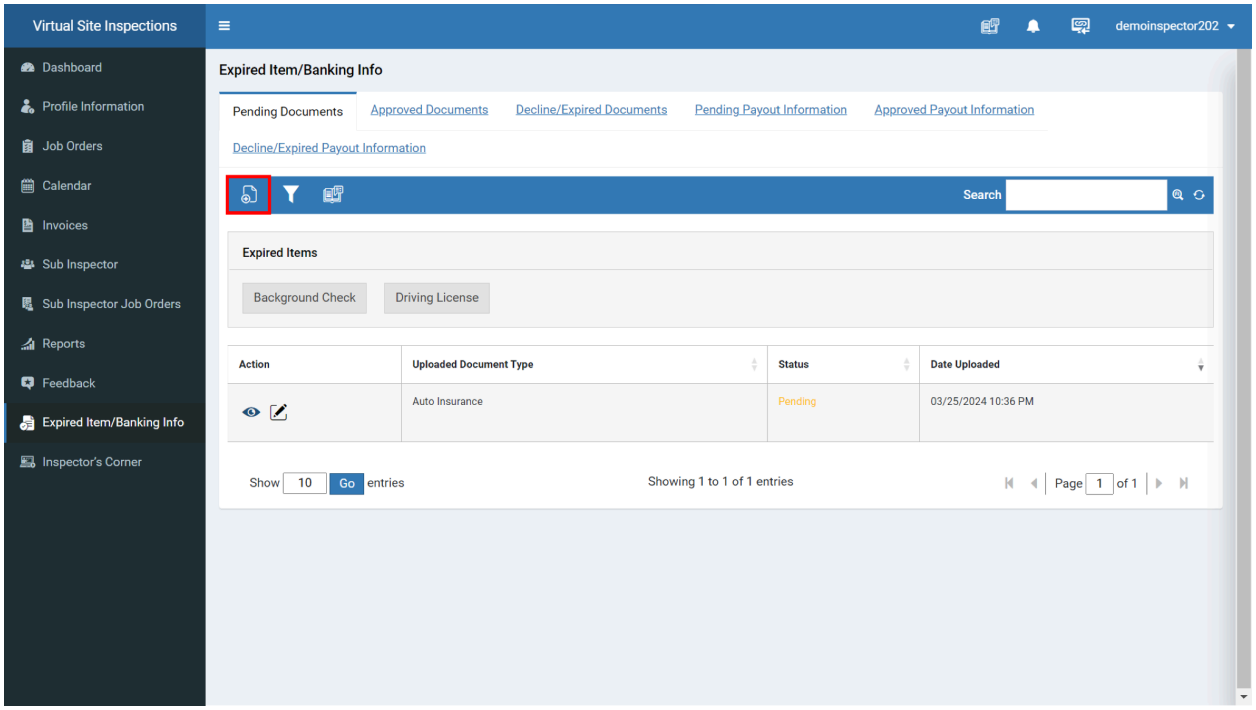


To search for payout information using a keyword, the system performs the search based on parameters such as the bank name and routing number. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and then press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant payout information records corresponding to the specified search criteria.

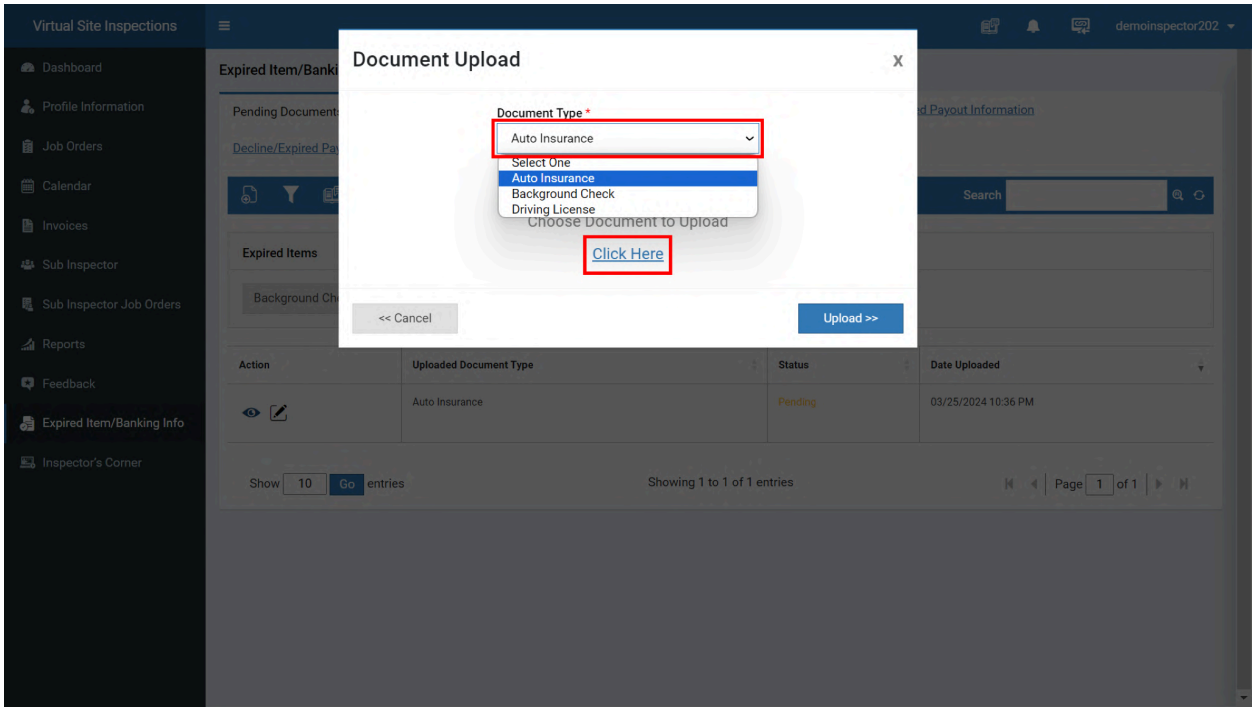


The "Expired Item/Banking Info" Page comprises six tabs: "Pending Documents", "Approved Documents", "Decline/Expired Documents", "Pending Payout Information", "Approved Payout Information" and "Decline/Expired Payout Information." The "Pending Document" tab showcases all pending documents, the "Approved Documents" tab presents a list of all approved documents, and the "Decline/Expired Documents" tab exhibits all declined or expired documents.

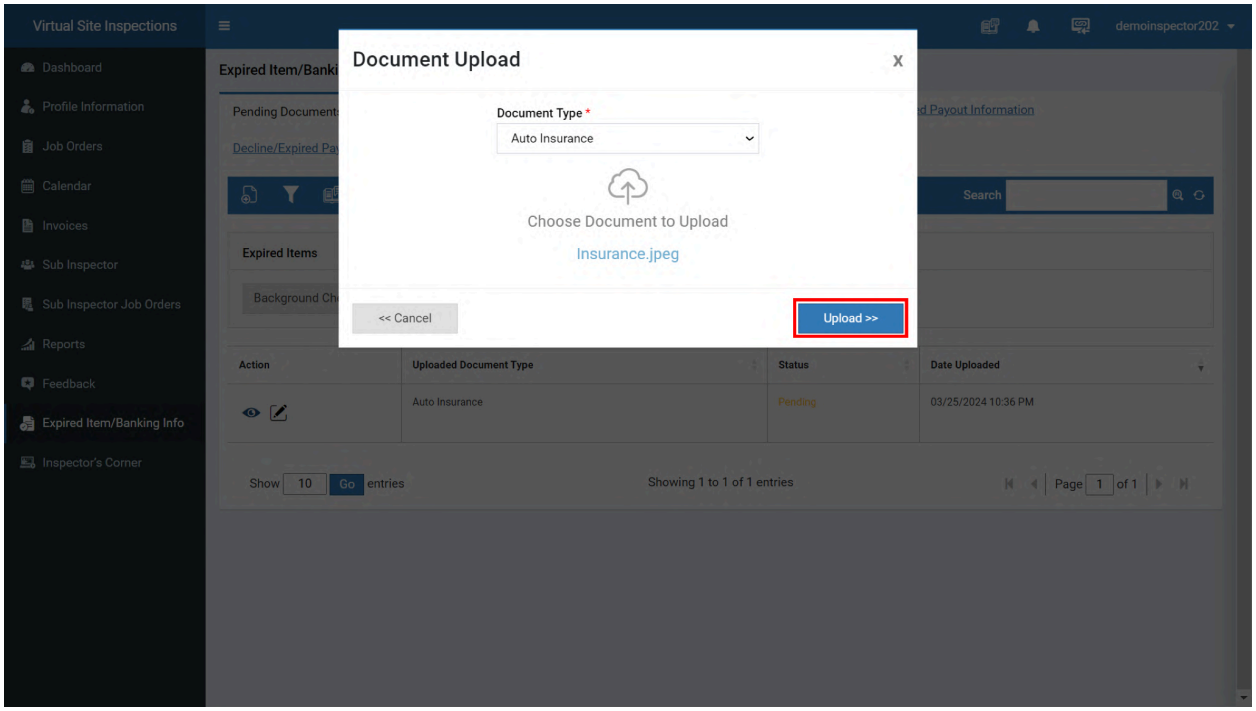
To upload a new document, inspectors can click on the "Add New" button icon. This functionality enhances the organization and management of documents within the system.



Upon clicking the "Add New" icon, a pop-up window appears. In this window, users can select the type of document from a dropdown menu. To upload the document, they need to click on the "Click Here" hyperlink, facilitating a straightforward process for adding new documents in the system.



After clicking on the "Click Here" hyperlink, a system pop-up prompts the user to select a file. The system allows the upload of only doc, pdf, and image files. Once the user selects a file, the system displays the name of the chosen file. Subsequently, clicking the "Upload" button finalizes the upload process, adding the document to the list.



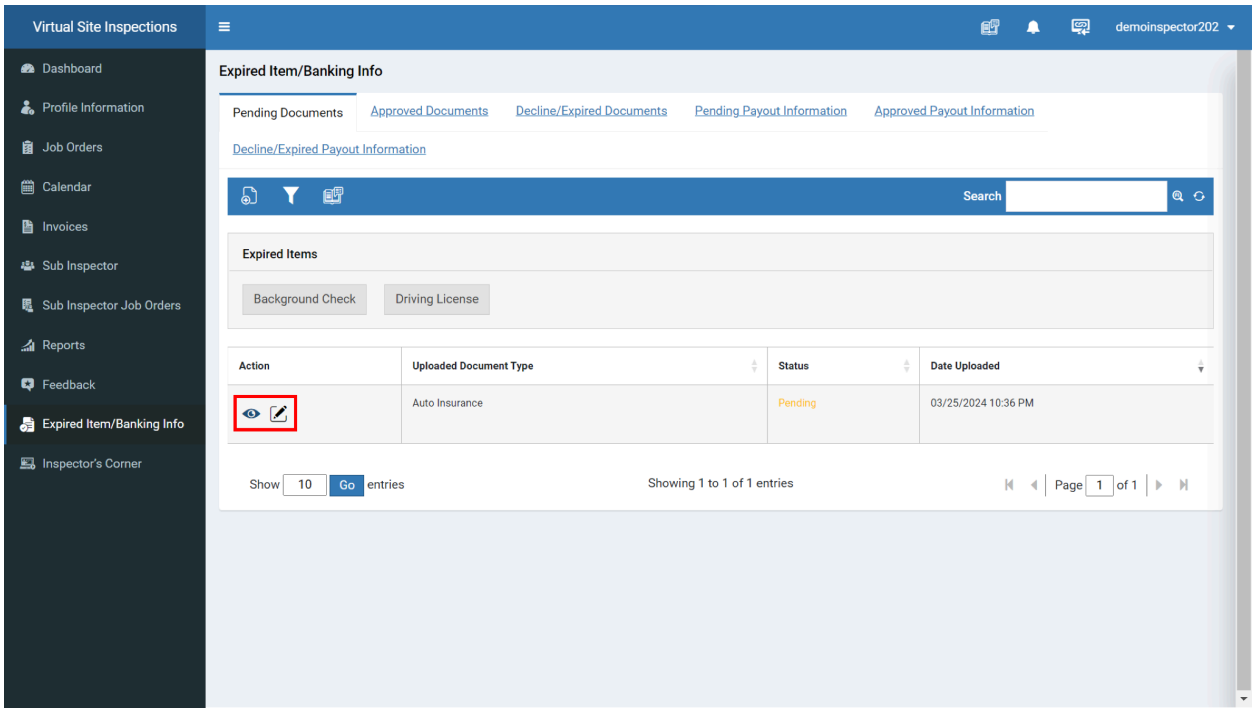
Various status tabs, such as pending documents, approved documents, and decline/expired, are assigned to documents within the system. When an inspector uploads a document, its initial status is set as pending. Upon approval by the admin, the document's status transitions from pending to approved. Conversely, if the admin rejects the document, its status changes from pending to declined.

If the inspector uploads a new document of the same type multiple times and the admin accepts or declines the status, the status of the latest document of that type changes accordingly. Meanwhile, the statuses of the previously uploaded documents of the same type are marked as expired. This ensures that the system recognizes and maintains the most recent document status while indicating that previous versions have expired.

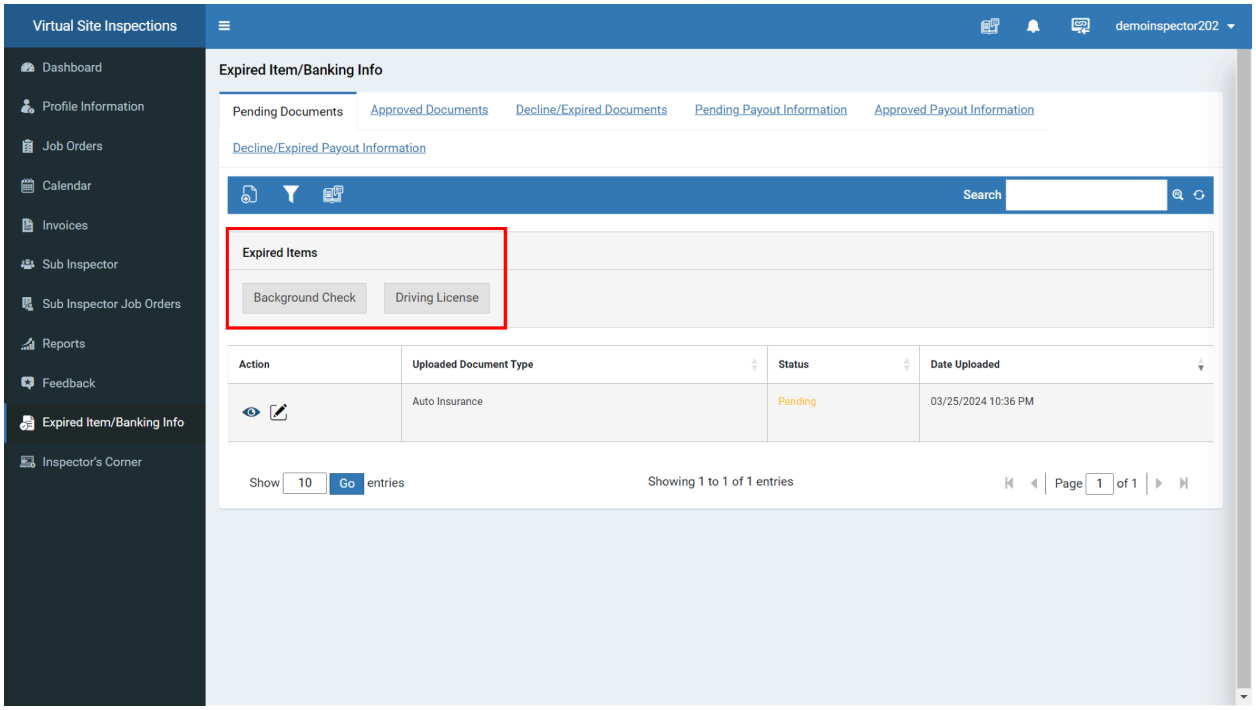
In the Document list, there are two icons: Edit and View. When the status is either approved or declined, only the View icon is displayed. For other statuses, both the View and Edit icons are visible.

To modify a document, click on the Edit icon, and the process follows the same steps as adding a new document.

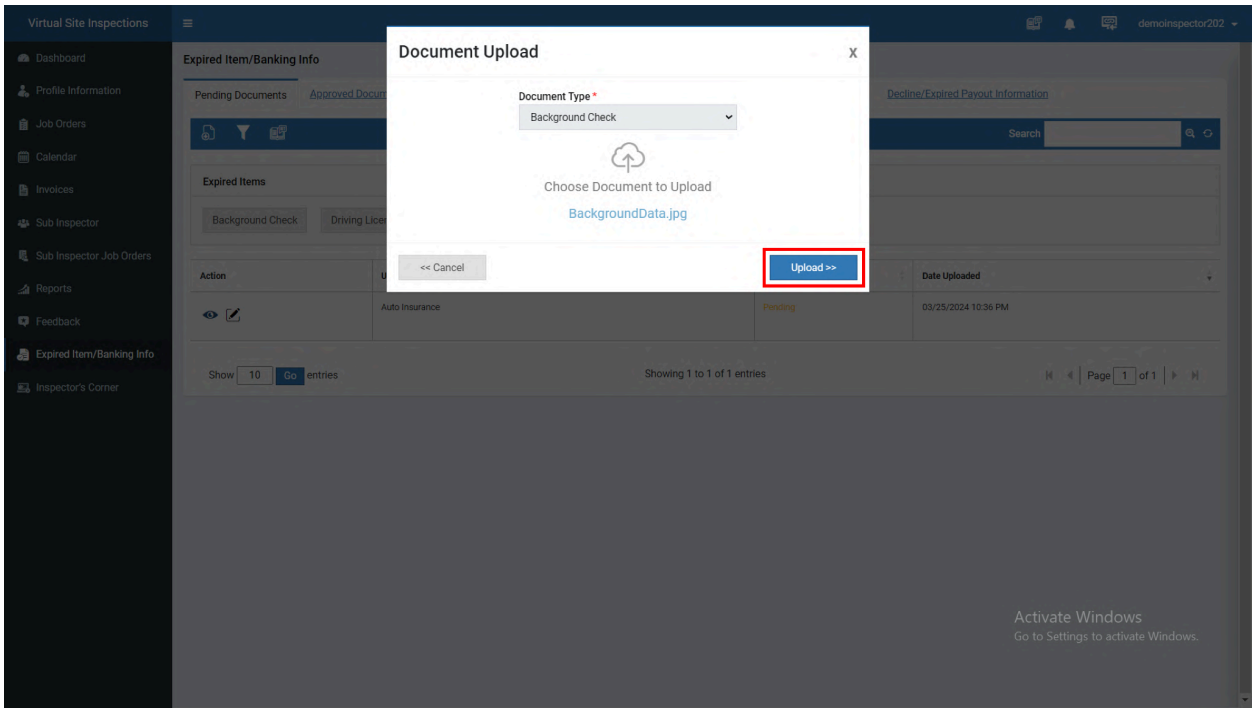
Clicking on the View icon redirects to a new window, displaying the document file that was uploaded into the system. This functionality enables easy access to view the content of the document directly.



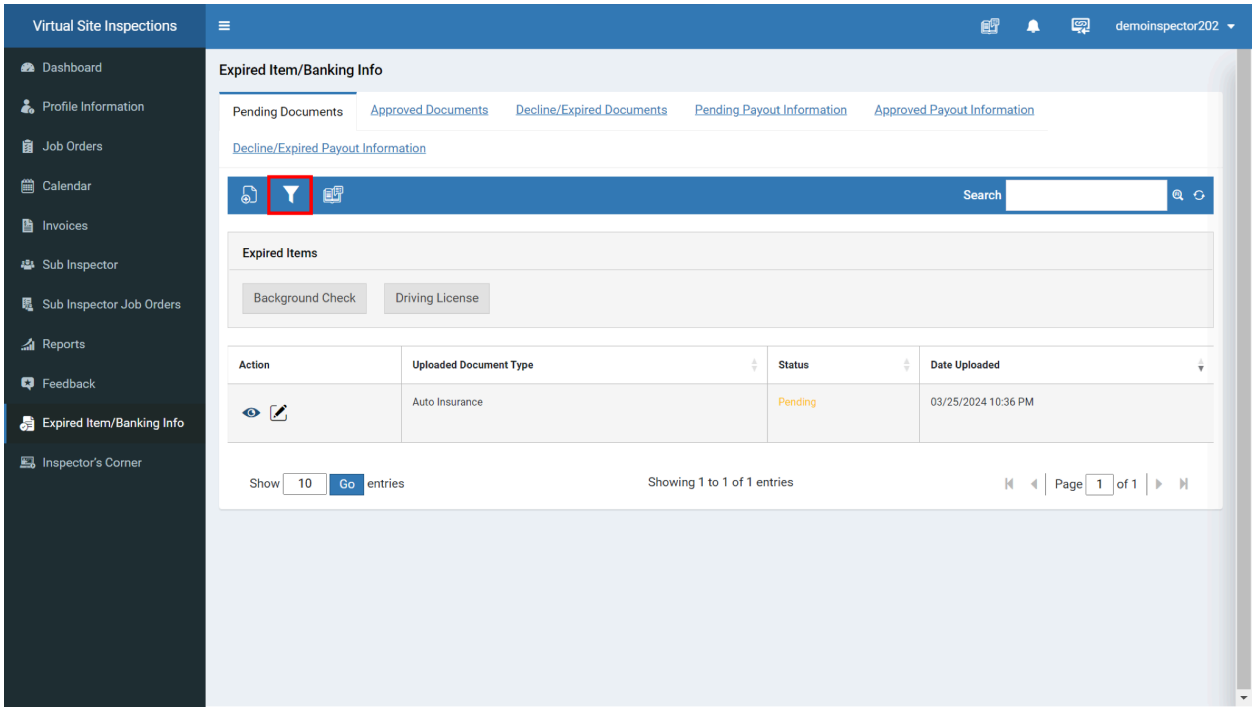
After the blue header bar, there is a section titled "Expired Items" that appears if any item has expired. This section becomes visible along with an "Expired Items" button.



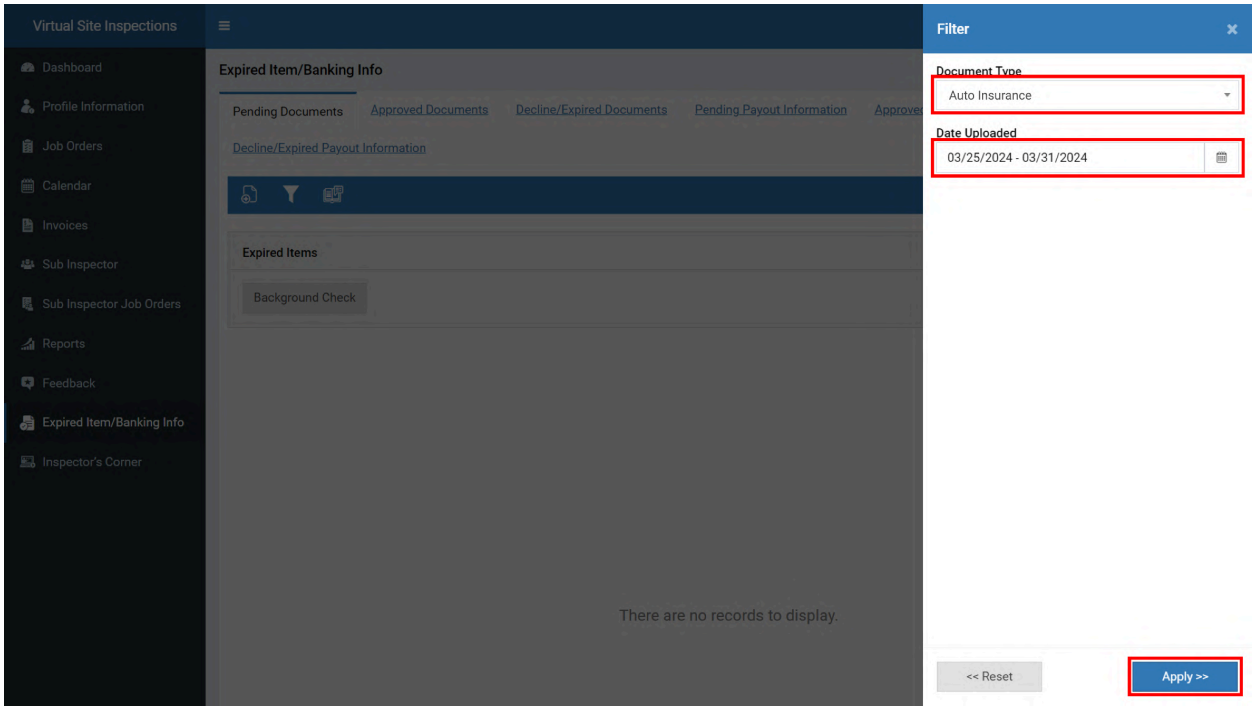
Upon clicking this button, it opens a dialog box for uploading documents. In the dialog box, the expired item is automatically selected in the drop-down menu, and it remains disabled, indicating that only document upload is required.



Inspectors have the ability to apply filters to documents, allowing them to refine and customize the display based on specific criteria.

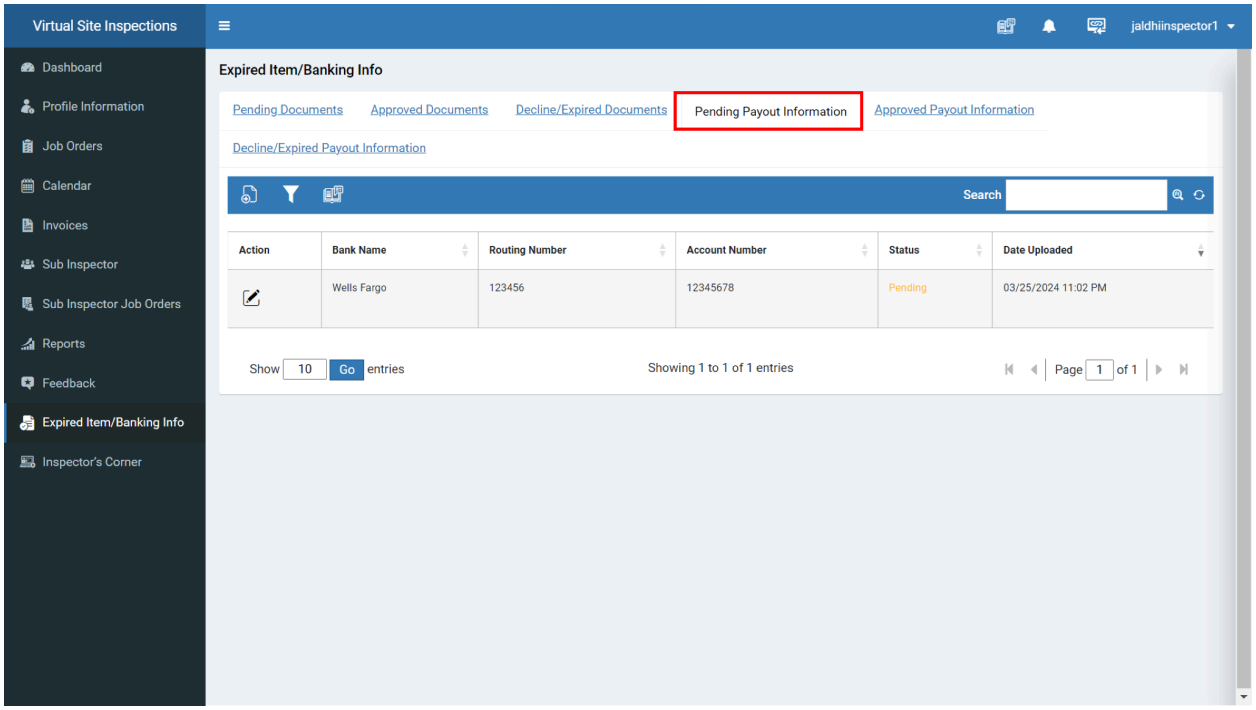


Clicking on the filter icon opens a side modal where users can select criteria such as type, date. After selecting the desired filter options, clicking on the "Apply" button returns a filtered list based on the chosen criteria, providing a tailored view of documents.

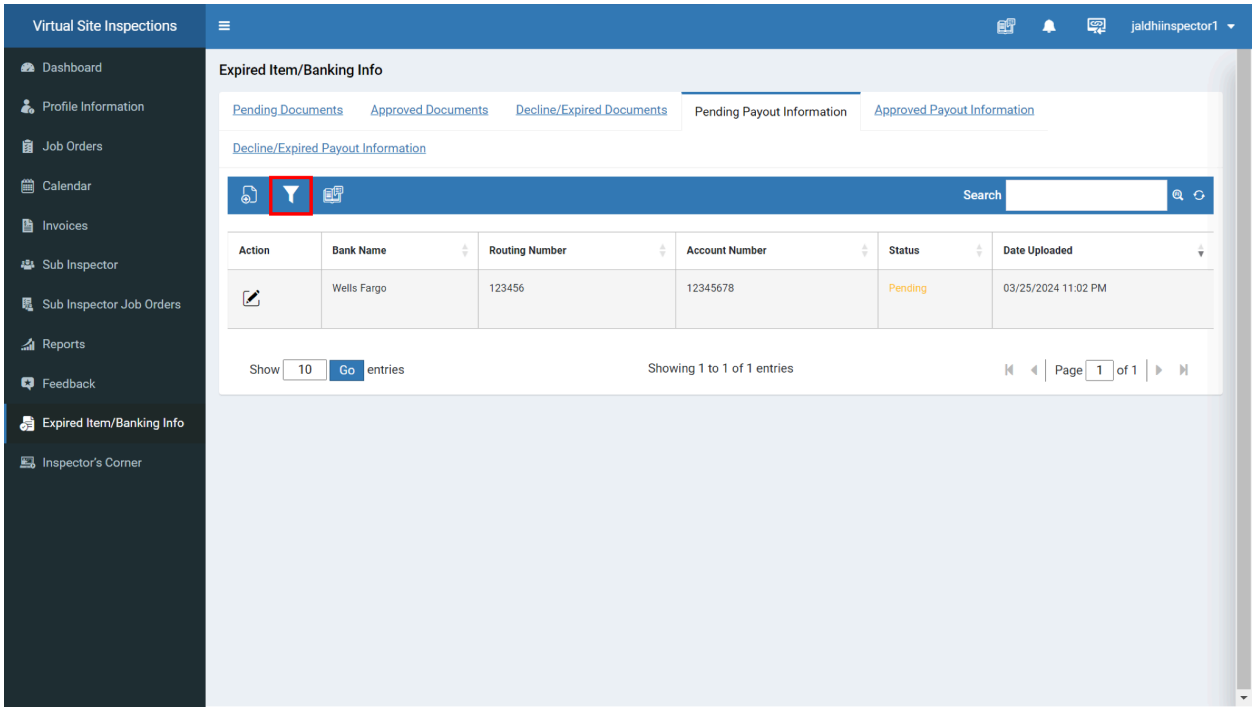


Inspectors have the ability to add their payout information. Additionally, they have the ability to view a list of the payout information they have entered.

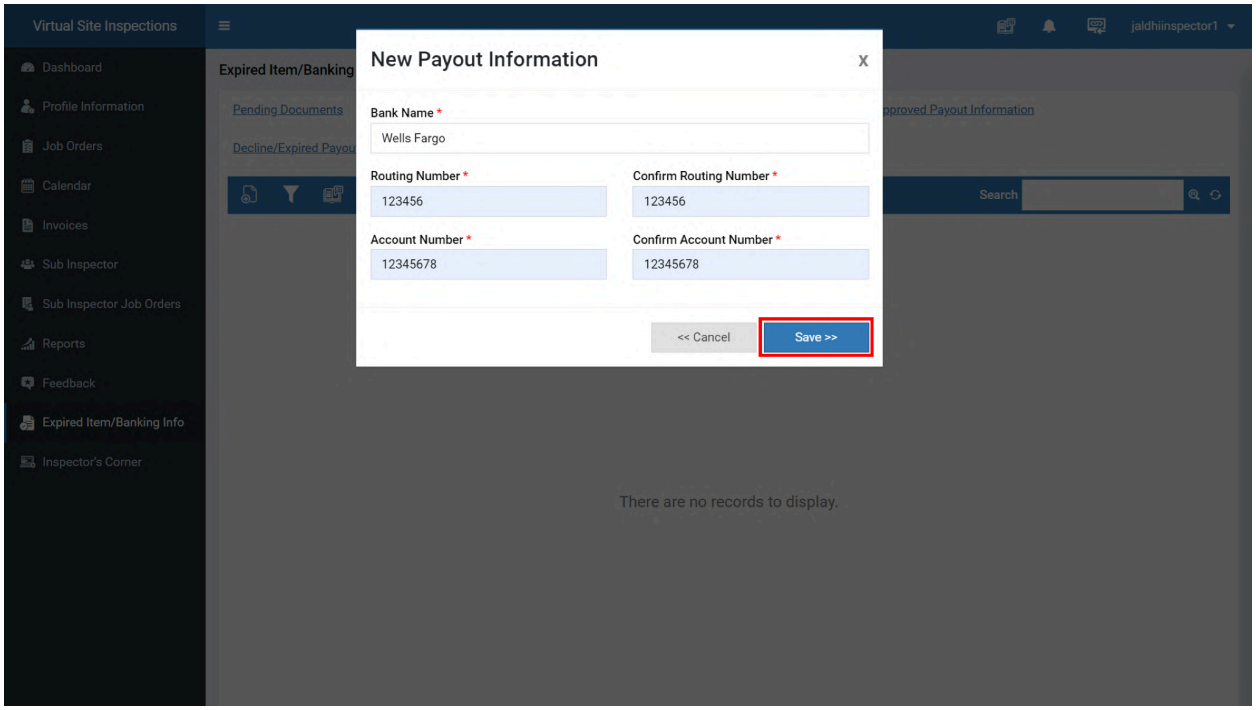
The purpose of adding payout information is to enable inspectors to update their banking details. Once banking information is added, it becomes disabled for modification. Upon the admin's approval of the payout information, your payout/banking information will automatically be updated in the 'Profile Payout Information' section of the 'Invoice Information' tab in your profile.



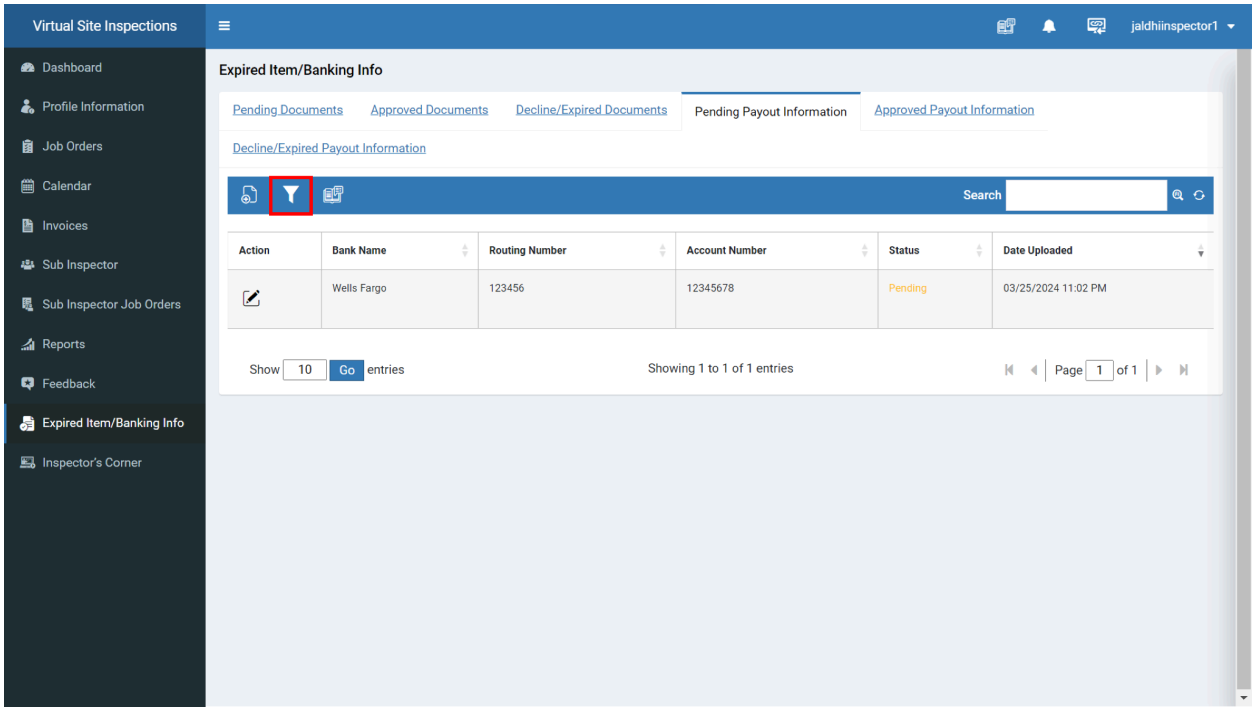
To add payout information, click on the "Add New" icon.



After clicking on the "Add New" icon, a popup will appear, prompting users to fill in details such as bank name, routing number, confirm routing number, account number and confirm account number. Once all the information is entered, clicking on the "Upload" button will add the payout information to the list and the popup will close.

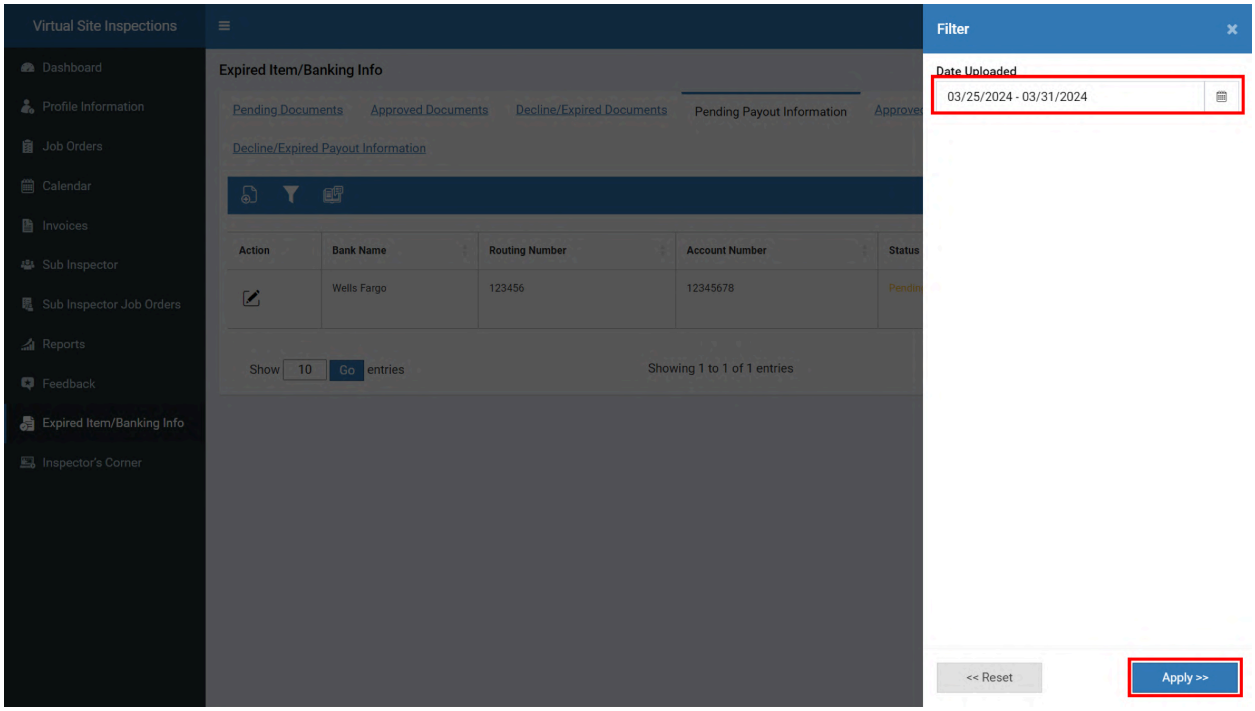


Inspectors have the capability to apply filters to payout information by clicking on the filter icon.



Clicking on the filter icon opens a side modal, allowing inspectors to apply filters to payout information based on criteria such as status and upload date. After selecting the desired

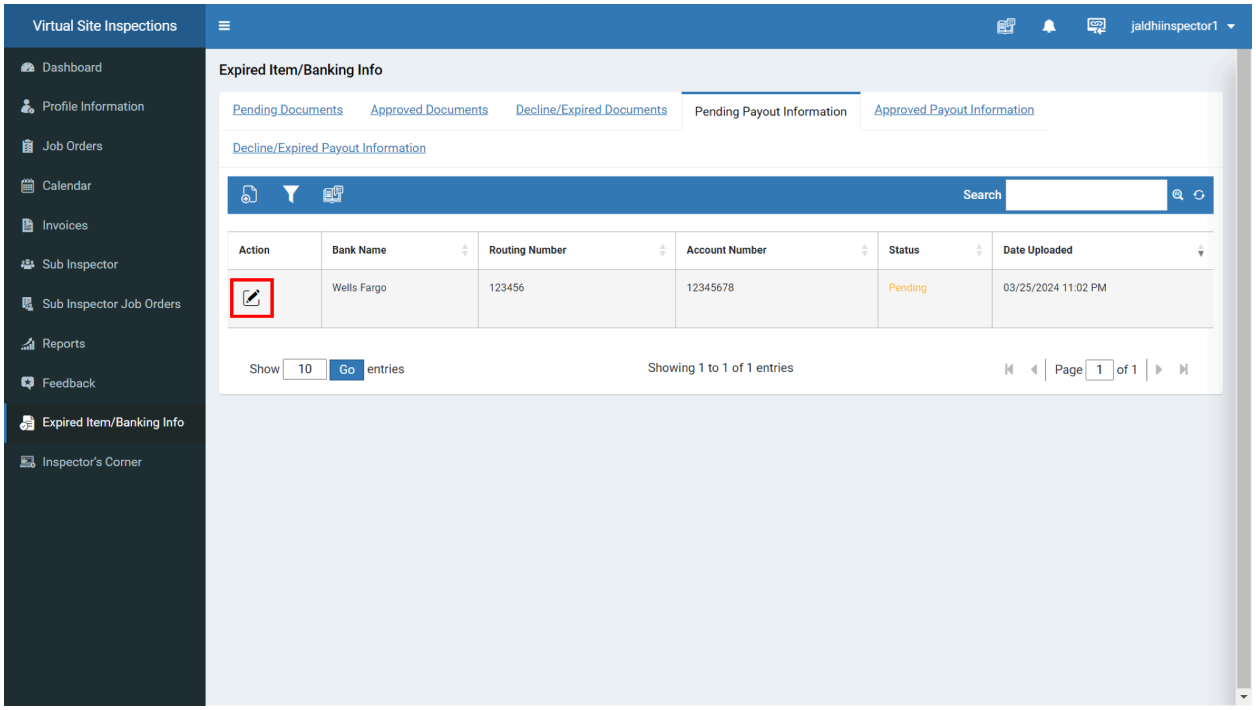
options, clicking the "Apply" button returns a list of payout information tailored to the chosen filter selections.



In the payout information list, various statuses such as pending, approved, declined, and expired are assigned to payout data. When an inspector add payout information, its status begins as pending. If the admin approves the payout information, the status transitions from pending to approved, and the new payout information will be updated. This updated payout information will be used for any subsequent payments.Conversely, if the admin rejects the payout information, the status changes from pending to declined

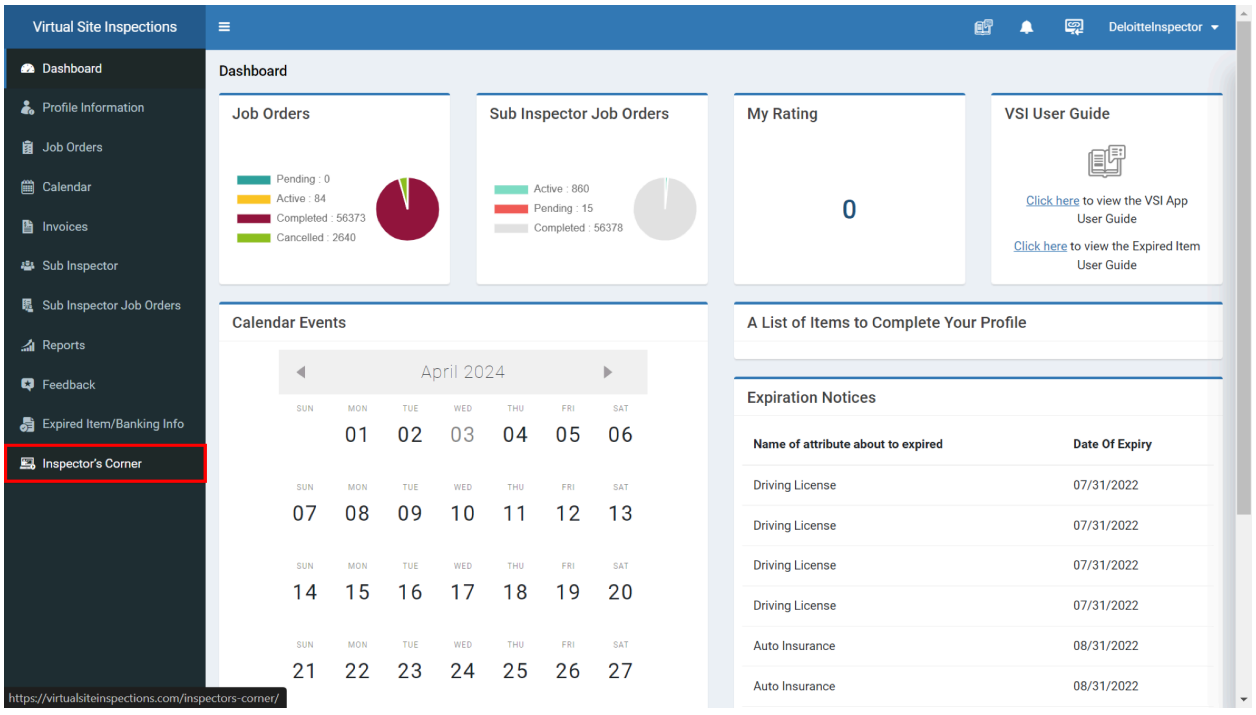
If the inspector adds new payout information of the same type multiple times and the admin accepts or declines the status, the status of the latest payout information of that type changes accordingly. Meanwhile, the statuses of the previously added payout information of the same type are marked as expired.

Within the payout information list, When the status is approved, declined, or expired, only the View icon is displayed. For pending statuses, the Edit icon is visible. To modify payout information, users can click on the Edit icon, and the process follows the same steps as adding new payout information. Clicking on the View icon opens a popup in disabled mode.



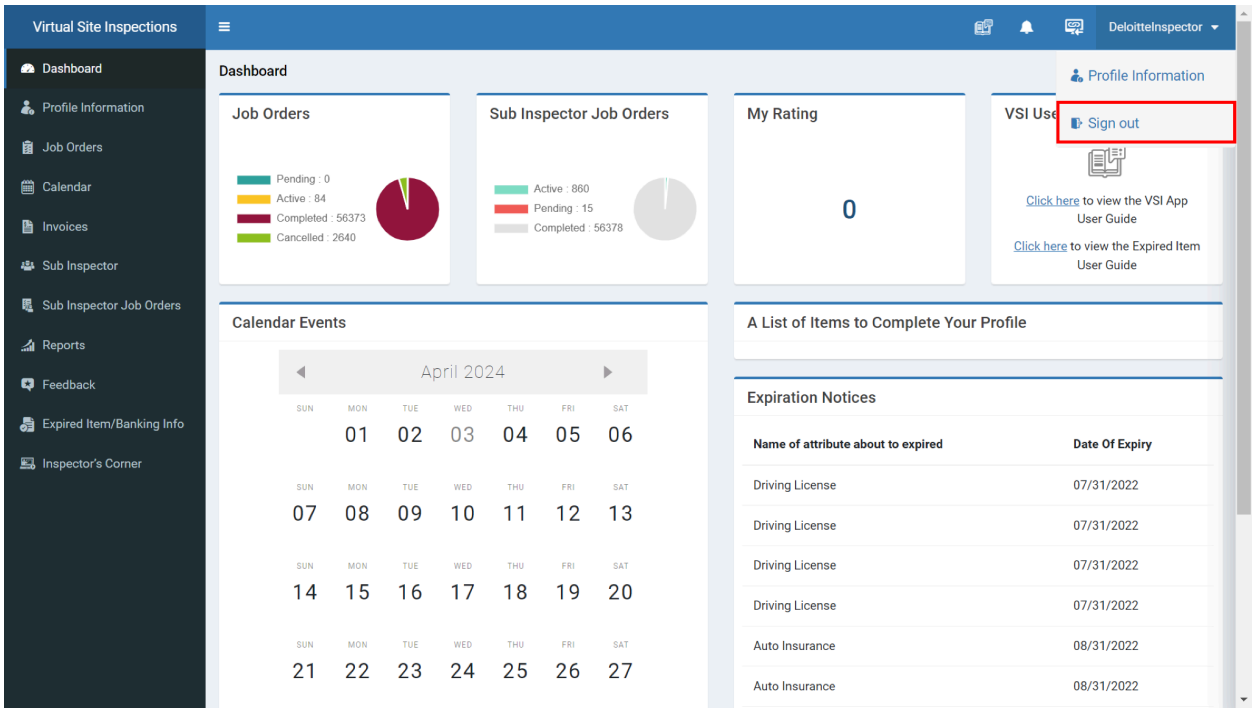
Inspector Corner

Inspector Corner is employed for user guides. When the Inspector Corner menu is clicked, it opens a new window with the corresponding specific URL.



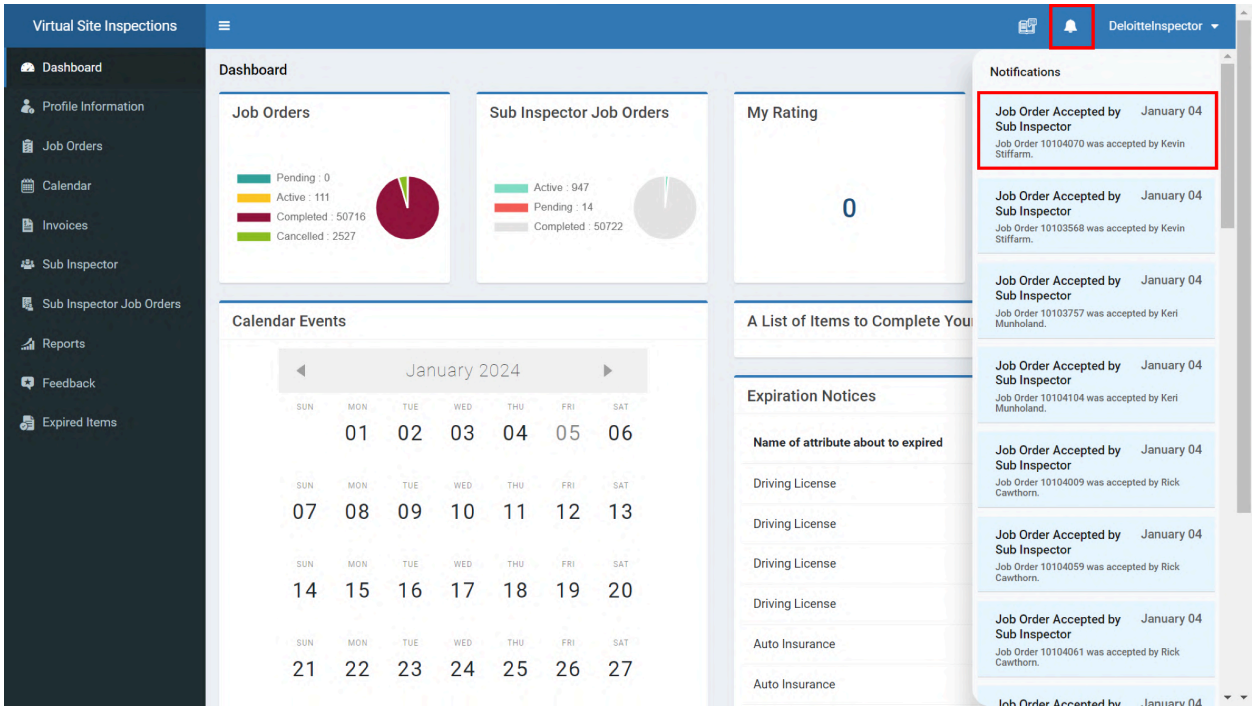
Log Out

Inspectors can log out of their portal by clicking on the icon located on the right side. Upon clicking, a dropdown menu will appear, and by selecting the 'Log Out' option, they will be redirected to the login page.



Notification

Sub inspectors can view all the notifications they have received by clicking on the notification icon. This action will open a side modal displaying all the events and notifications.



User Guide

Inspectors can access the user guide document by clicking on the 'User Guide' icon. This action will redirect them to a new window, opening the document.

